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ABSTRACT

Three papers addressing the topic, "Toward Consensus on Minimum Criteria for Educational Products" provide a state-of-the-art review of useful criteria for evaluating educational products in part I of this report. The second part is a summary and comparison of the research findings of two EPIE surveys on selection criteria being used by state and local educational agencies across the United States. The original survey was conducted in 1969 and updated in 1976. (Author/CMV)

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CRITERIA FOR REVIEWING

EDUCATIONAL PRODUCTS

Product I. NIE Products
on Instructional Materials Selection
(D.H.E.W.) Contract #400-75-0023

By EPIE Institute
475 Riverside Drive
New York, N.Y. 10027

ERIC Clearinghouse on Information Resources
Syracuse University
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PREFACE

The National Institute of Education contracted with EPIE in 1975 to look at three questions: Who is it that decides what materials to use in the classroom? How do they even begin to approach the problem of selecting from the available materials? What criteria are being used for screening and selecting among the numerous products available?

Five products which have come out of this project are being made available to the public: this is Product I. Products II, III, and IV are available through the ERIC system, and Product V, The Annotated Bibliography of Studies and Conceptual Papers Related to the Selection of Instructional Materials, will be expanded and incorporated in EPIE Materials Report: Number 87m ("Guide to Selecting Instructional Materials") to be published early in 1979.

This volume (Product I) is divided into two parts. Three papers addressing the topic, "Toward Consensus on Minimum Criteria for Educational Products," provide a state-of-the-art review of the subject in Part I; the second part is a summary and comparison of the research findings of two EPIE surveys on selection criteria being used by state and local education agencies across the country. The first survey was conducted in 1969 and updated in 1976.

These three products are currently in the ERIC microfiche collection and may be ordered in either microfiche or photocopy from the ERIC Documents Reproduction Center:

The Education Division's Joint Dissemination Review Panel: Three Papers. Product 2. 34p., 1977. ED 156 217

Schermer, Diana. A Survey and Analysis of Educational Review Activities (A Preliminary Review). Product 3. 93p., 1975. ED 156 218

Description of Selection Guidelines: Description of Guidelines, Training Materials, and Consumer-Oriented Catalogs To Be Used in the Selection of Instructional Materials. Product 4. 65p., 1976. ED 156 219

Syracuse University
November 1, 1978

Product I. CRITERIA FOR REVIEWING EDUCATIONAL PRODUCTS

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Part I. INSTRUCTIONAL PRODUCT-SELECTION CRITERIA: THREE PAPERS

A. Toward Consensus on Minimum Criteria for Educational Products

by Susan S. Klein
National Institute of Education

Recent estimates suggest that there are more than 500,000 different educational products** available in the U.S. today (Komoski, 1976). Have you ever thought about the type of decisions that are made about any one of these products during its lifetime and about who might make these decisions? This paper is intended to speculate on answers to this question. By doing so, it is hoped that greater knowledge will be gained about product decision-making which, in turn, will help determine if and how agreement can be reached on establishing some minimum criteria of product quality for product decision-making. It is believed that greater consensus on minimum criteria will help consumers acquire more appropriate, higher quality educational products and thus improve American education.

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* This paper reflects the views of the author only -- Dr. Susan S. Klein, Dissemination and Resources Group, National Institute of Education, Washington, D.C. 20208 -- and does not necessarily reflect the views of NIE or of the Department of Health, Education, and Welfare. This paper was summarized at Symposium 15.10 at the AERA annual meeting, San Francisco, California, 21 April 1976. The author acknowledges the helpful assistance of Carolyn Clark for her analysis of criteria used by NIE producers, of Don Fischer for help with telephone interviews, and of Morton Bachrach and Cornelius Butler for revision suggestions.

** Products, for the purpose of this paper, are defined as instructional materials which are in a transportable, tangible, and packaged form. Examples include conventional curriculum materials (viz, textbooks, films, filmstrips, overhead projection transparencies, manipulatives, multimedia "kits," instructional "systems," and the like), computer programs, staff-training materials, guides, models, documented administrative procedures, Project Information Packages (PIPs, i.e., packaged programs), and Learner Activity Packages (i.e., LAPs, which are packaged teaching practices). "Nonproducts" include: practices, methods, programs, procedures, or techniques which have not been described in sufficient detail to enable replication without assistance from the originators or their representatives. In this paper, attention is given to instructional rather than other informational products such as research reports and library books.

At the present time we have limited organized knowledge about what criteria are used, by what decision-makers, and with what types of educational products. Preliminary findings suggest that educational product decision-making is more complex than one would suspect. Decisions about any one product may be made by many different groups for several different purposes.

The end result is that the product consumers or users rarely know if the product has been reviewed or, if it was, by whom. It is generally true that consumers have no knowledge of the criteria which were applied by the developers to initiate, to revise, or to market a product; nor do consumers know the criteria used by the reviewers, who were to serve as consumer protectors. In an attempt to explore systematically what criteria are used by various groups who play a role in determining a product's destiny, this paper addresses three major types of product decisions:

I. Product-development decisions are those whereby product developers, publishers, and financial sponsors play major roles in determining whether a particular product should be developed and, if so, whether it should be evaluated, revised at some time, and disseminated.

II. Product-screening decisions are made after a product is developed, when groups or individuals other than developers, publishers, and financial sponsors screen or review the product or information about the product or both to determine whether or not it is of sufficient quality to recommend to consumers.

III. Product-selection decisions are made when individuals actually decide to purchase or to use the product.

For purposes of simplicity, 13 decision-maker groups have been identified ranging from product developers to state education agency personnel to students. Also, for the sake of convenience, the criteria have been grouped into six convenient clusters: desirability, practicality, intrinsic quality, product development, user effects, and spinoffs. An analytic framework has been established in order to identify those

criteria which are important to the various product decision-maker groups in an effort to arrive at consensus on minimum criteria.

In order to become oriented to this conceptual framework examine the Product Decision-makers' Criteria Chart. This chart establishes the above-mentioned framework for use in discussing the three types of product decisions representing 13 decision-maker groups and the six criteria clusters.

Decisions and Decision-makers

As was stated previously, Product-development decisions are generally made by the product developers, the publishers, and the financial sponsors of the development. Although these three groups are usually three parts of one larger group, it's convenient here to consider them as if they were discrete. These three groups, then, play major roles in determining whether a product should be developed in the first place, evaluated, revised, and placed on or removed from the market.

Product-screening decisions, which are intended to influence the product or product information dissemination activities, are performed by many individuals represented by the following seven groups (some of which are involved also in product-development decisions): federal education agencies, state education agencies, intermediate service agencies, local education agencies, other organizations with relevant expertise, education personnel organizations, and consumer organizations. These groups play a consumer-protection as well as a dissemination role. They are needed since consumers cannot individually make decisions relating to the use of more than a few of the one-half-million

available educational products. Product-screening decisions generally result from reviews of multiple product alternatives. In reviews, as contrasted with evaluations, a limited amount of time is spent examining the products or information about the products or both. (In an empirical evaluation, specific data are collected and analyzed.) Reviewers or screeners must rely on available information. The positive results of the screening decisions may be communicated by approved lists of products, catalog product displays, or through informal oral channels. In many cases, the screener's recommendations do not reach the individuals who select the products. Federal agencies often have mandates to improve education in certain problem areas and thus review products to determine those of high quality. An agency may provide financial support to aid in the dissemination of products which it identifies as high quality or, at the minimum, it may ensure that the information provided about the products clearly sets forth their strengths and weaknesses. State education agencies have legislative responsibility for curricula and many have enacted legislation to protect their students and teachers from low-quality products (regulatory responsibility) or at least to encourage them to select high-quality state-approved products (dissemination responsibility). Sometimes, states have legal requirements about adhering to certain criteria. Intermediate service agencies are generally sponsored by federal programs (such as the Bureau of Education for the Handicapped, and Area Learning Resource Centers), state departments of education, or local education agencies operating in a cooperative mode. (For example, many local education agencies have formed media cooperatives to screen and to share supplementary educational materials.) Local education agencies may function like state or intermediate service agencies when they screen products. As at the federal and state education agency levels, there is much variation in the locals' use of product-screening procedures and criteria. In some cases, school boards "rubber stamp" reviews by curriculum committees.

In other cases, curriculum specialists make independent screening decisions or recommendations to others.

There is also a wide variety of education experts associated with organizations, such as higher education institutions and R & D organizations or professional associations, who play a role in screening educational products which others may use. Some groups such as NEA, AFT, AASA, ASCD, and NCSS, with a major interest in product screening, represent the education personnel organizations. Finally, consumer organizations, such as Educational Products Information Exchange (EPIE) Institute, are responsive to the needs of education practitioners, product consumers, and lay groups concerned with education. Other consumer groups include P-TA, NOW, the Council on Interracial Books for Children, Women on Words and Images, and other citizens' groups. Product-selection decisions are generally made by administrators (including librarians and other noninstructional personnel), by teachers, and, occasionally, by students. Sometimes -- probably, most of the times -- the purchasers of the products are not the actual users. The products are chosen from among those which appear most appropriate for use with particular individuals for a specific purpose and in accordance with available resources. Types of products selected range from those needed to augment a library or resource center to textbooks and supplementary instructional materials.

Certain individuals may make several kinds of product decisions. For example, federal, state, and local education agencies are often concerned with developing high-quality products and also with helping consumers to identify and to acquire only high-quality, appropriate products whether sponsored by them or by others. Purchasers may function also as screeners. Teachers may be product producers and screeners.

Criteria Clusters

The six criteria clusters -- (1) desirability, (2) practicality, (3) intrinsic quality, (4) product development, (5) user effects, and (6) spinoffs -- are arbitrary groupings. These clusters could be expanded or contracted and many of the items in the clusters could be included under different cluster headings.

(1) Items in the desirability cluster include need; appropriateness for intended users; adherence to local social, moral, and instructional values; and demand. The major distinguishing common characteristic is that the items are particularly idiosyncratic to the local product decision-maker; for example, an item such as the "scope of the contents" may be viewed by one decision-maker as desirable and by another as unacceptable.

(2) Items in the practicality cluster include those which bear upon the advantages and disadvantages of the product, such as compatability with the decision-makers' resources. These criteria are not as idiosyncratic as the desirability criteria because many decision-makers would agree on such common practicality virtues as reasonable cost, availability, ease of use, and the like.

(3) Intrinsic quality criteria are those which must be ascertained by examining the product itself rather than by simply reviewing information about the product. Standards have already been established for many of these items but experts may be needed to apply the standards. Items in this cluster include: sex, race, ethnicity, age, and socioeconomic fairness or balance; content accuracy and currency; instructional quality; technical quality; appeal; etc.

(4) Product development criteria are generally secondary indicators which suggest that if developed with care and proper procedures the product would certainly be adequate.

(5) User Effects refer to documented results which have occurred and which may occur again when the product is used as directed with a similar target

group. For our purposes user effects are not just vague statements that something is supposed to happen. On the contrary, they indicate that there is evidence that something beneficial or harmful has happened.

(6) Spinoffs are by-products such as the development of unique models or research knowledge stemming from work on the product.

PRELIMINARY RESULTS

Criteria of importance to each decision-maker group have been obtained as a result of an analysis of preliminary data gathered from a review of some of the sparse literature in the field; by analyses of criteria lists; and from about 20 informal telephone interviews based upon the appended Product Decision-Makers Criteria Chart.

I. Product Development Decisions

R & D Developers

A preliminary analysis of the product descriptions in the Catalog of NIE Education Products reveals that these NIE-sponsored R & D developers made assurances or claims about the attributes of their products in all six criteria clusters. Under desirability they mentioned user demand for the product; under practicality competitive price and ease of use were cited frequently. Intrinsic quality attributes commonly mentioned are content accuracy and race and sex balance. Under product development careful design and development procedures were claimed. Related data suggest that two-thirds of these NIE products underwent Learner-based Revision or L-BR (formerly, Learner Verification and Revision or LVR). The developers made numerous claims of user effects and frequently multiple types of user effects were claimed for the same product. An examination of a sample of 50 products where user effects were claimed indicated that 78 per cent stressed the positive effect of the product on the learner's ability to

complete specified learning tasks to a mastery level; 64 per cent stressed cognitive effects such as significant gains in the amount or rate of learning. Generally, these cognitive effects were measured by standardized achievement tests or criterion-referenced tests or both. Seventy-six per cent of the sample claimed evidence of user satisfaction and 34 per cent claimed motivational improvements. Developer anecdotes, interviews with users, and attitude studies were primary sources of this evidence. Occasionally, the developers made negative claims. There were only occasional claims in the area of spinoffs. However, items on this cluster and the other clusters are being examined in detail for more than 600 NIE products.

Publishers

Based on very limited data which were probably biased to favor R & D type publishers, it appears that publishers think that all six criteria clusters are important. Under desirability the few publishers interviewed asked questions relating to demand such as: Are there enough buyers? Does the product complement other products offered by the firm which can be marketed at the same time? Does the product satisfy a need not being met by others? Is the consumer climate ripe for the product and are its values such that it will be acceptable to target users? Under practicality the publishers mentioned the need for product flexibility, competitive price, the ability of their organizations to service or otherwise aid the product consumers, and ease of using the product. Under intrinsic quality some publishers mentioned their sensitivity to sexism since they lost some major sales because of sexism in their materials. The product packaging and visual appeal to purchasers (i.e., teachers) were mentioned as being important to sales although not necessarily contributors to effectiveness. The publishers interviewed felt that careful product development was important to their firm, and that development would

include user testing and appropriate revision. One publisher mentioned that it gives user warranties for performance and servicing of the firm's products. The publishers interviewed did not use criteria checklists; instead they hired experts who are supposed to apply these criteria to their development decisions on a daily basis.

Each publisher represented in the sample said that there should be user effects criteria for instructional products. Some felt that positive spinoffs may occur but that they are generally identified post hoc. For example, developers try to utilize past product ideas that work when developing new products.

Financial Sponsors of Development

In the last few years, both NSF and NIE have conducted a few systematic reviews using criteria lists to help external reviewers advise them on the desirability of continued investments in the development and dissemination of some of the agency-sponsored products. NIE reviewers have utilized all criteria clusters in this framework except spinoffs and have especially considered evidence of effectiveness and the credibility of that evidence. In its most recent review of some of its sponsored curricula, NSF did not include the criteria for demonstrated user effectiveness with a specified group. Instead, NSF asked their reviewers if the producer's proposed or anticipated outcomes were desirable. Under this desirability cluster NSF also seemed concerned with the reviewers' personal feelings about the value of the products.

Both NSF and NIE stressed the importance of comparing their own sponsored products with other products which may have been sponsored by other sources. A foundation sponsor of product developers emphasized the importance of identifying highly qualified developers in the subject area and a large

publishing company which would make the completed product known and available to consumers.

IIa. Product Screening or Consumer Protection Dissemination Decisions

Federal Agencies

Federal agencies concerned with education may conduct reviews using their own staff, may supervise external reviewers, or may fund contracts designed to identify and screen education products preliminary to final product-selection action. In the inhouse review category, the OE/NIE Joint Dissemination Review Panel reviews only for product and program effectiveness, although it is requesting that the agencies do preliminary screening on criteria related to the freedom from sex, race, ethnic, social, economic, and age bias and reasonableness of price. Due to recent Congressional pressure, NSF has "tightened up" its curriculum review process. A recent report (Schermer, 1975) reviewed 12 federally funded product-screening activities. Most of these reviews utilized criteria in the desirability, practicality, intrinsic quality, and user effects clusters. However, it should be noted that screening activities for only a couple revealed use of criteria relating to freedom from sex, race, or other biases. Most federal reviews have examined actual user effects and found little information indicating use of this criterion. The federal product screening criteria related to desirability are usually quite general. Product development criteria are mentioned infrequently, and spinoffs were not mentioned.

State Education Agencies

According to a recent survey there are more than 20 states which have state instructional materials adoption legislation or regulations. This "adoption territory" covers more than 40 per cent of the student population in the U.S. Other "nonadoption" or "open" states also provide guidance to

educators on product selection. From this preliminary EPIE review of state-screening criteria, it appears that states are quite concerned with the desirability, practicality, and intrinsic quality criteria clusters. A few are concerned with product development criteria such as Learner-based Revision (L-BR). There has been practically no state inclusion of positive learner effects criteria in any of the checklists reviewed to date; however, some states have used effectiveness criteria in identifying, validating, and disseminating programs.

In the desirability criteria cluster, several states seem unduly concerned with whether or not a product reflects conventional American ideals, freedom from partisanism or sectarianism, traditional morals, and the absence of violence and profanity. One state criteria list specifies that evolution should be identified as theory and not fact. In the practicality cluster, the states are concerned with amount of teacher training required, teacher and student aids, adaptability, the presence or absence of an evaluation component, and price. In the intrinsic quality cluster many states appear to have increased their attention to social fairness factors from 1969 to 1975. States are also concerned with currency and accuracy of the information in the product and the adequacy of the product's physical features such as economical and durable construction. Currently two states have L-BR (but called "LVR") legislation which would suggest their concern with the adequacy of product development; other states use L-BR as a part of their general screening criteria. The only state criteria statement found in this survey relating to user effects is concerned with avoiding negative user effects so violent that they would detract from the product's value.

Intermediate Service Agencies or ISA Groups

Based on the little we know about intermediate service agencies or groups, it

appears that their main product-dissemination functions have been to display state-approved and other products and sometimes to circulate mainly media products or information on the products to the consumers, for their review or use. These ISA groups often use screening criteria to determine what they should purchase for their collections and sometimes they collect user data. The desirability, practicality, and intrinsic quality criteria clusters seem most important to the ISA groups we have examined. Under intrinsic quality, many mentioned authenticity, technical quality, and aesthetic value. However, there was no mention of screening for sex, race, or ethnic fairness. Since most of the experience of these ISA screening groups was with media materials, which are less likely than textbooks to have easily measurable instructional effects, it was interesting to note the ISA groups' common use of user effects criteria. Several ISA respondents did say that this effectiveness information should be summarized in a way that teachers could understand it. There was little mention of screening products for the adequacy of their development, although one ISA representative made some points about considering the credibility and honesty of the producer and the producer's ability to share information on other users' positive and negative experiences.

Local Education Agencies

Criteria used by LEAs are probably similar to those used by states, except that school districts are less likely than states to have written criteria or consistent review procedures. For example, one school district official said that his district considers changing products frequently but seldom goes about this change in the same way twice. There is also a wide variety of ways that school boards and teacher-review groups participate in the product-screening process. One small study (Schaffarzick, 1975) indicated that in 35 per cent of the cases the local education agency reviewers saw only the actual product or a sample, 4 per cent reviewed only product costs, and at least 58 per cent had no evidence of

the need for the product and its effects.

Under the desirability criteria cluster, in addition to values such as loyalty and Americanism, one of the ten district criteria lists reviewed mentioned "helping children find joy in reading." In the intrinsic quality cluster, many districts appear to have increased their attention to social fairness factors from 1969 to 1975, but not all of those which included racial or ethnic fairness criteria in 1975 also included freedom from sex bias.

Typically, school districts do not pay much attention to criteria related to product development, but those that have paid attention mentioned the need for authors to have teaching experience and adequate scholarship. New York City has a pilot L-BR screening activity for nonbook media. In the EPIE survey of ten districts there was limited attention to user effects. At the most, one district in the group was interested in having the teachers rate some student reactions relating to motivation and inquiry. A school district not in the EPIE survey asked if the material achieved its stated purpose. Where written criteria and procedural guides exist, school districts may have different criteria guidelines for the review of library books, media, and textbooks.

Expert Organizations

Frequently, individuals from higher education institutions, testing or other R & D organizations, or discipline-oriented associations are asked to serve on product-review teams or to conduct independent product reviews. These individual specialists are generally selected for their expertise in the subject area, in instructional technology, or in evaluation. In some cases, these expert organizations have been requested to conduct the review of

alternative products for another group, such as a federal education agency, and some prepare lists of exemplary products for their constituents. The few individuals interviewed from those organizations generally feel that items in all six criteria clusters are important but they also mentioned some new criteria items. These include, in the desirability cluster, the degree to which the material relates to other curriculum materials. For example, it would be desirable to have familiar story characters in an elementary reader. Under practicality, a reviewer mentioned the idea that products should be "scanable" and that cost is important but may be misleading. In the intrinsic quality cluster one expert feels that the instructional objectives should be spelled out or easily inferred. The experts queried also feel that in the user effects cluster the impact of the product is important, and one expert mentioned that this is somewhat dependent on a good distribution system.

Organizations for Education Personnel

Organizations for education personnel differ in the extent of their interest and involvement in reviewing products or in advising their members on product-review criteria. With the exception of the American Association of School Administrators (AASA), whose task forces have developed criteria guidelines in areas like sex fairness, the groups representing administrators have recently been concerned with establishing systematic review procedures to handle citizen complaints. The central staff members interviewed from two major teacher groups, the National Education Association (NEA) and the American Federation of Teachers (AFT), differed in their views on product review. The AFT respondent said criteria for screening products are not important because "a creative teacher can use anything." The NEA respondent said that NEA would want to apply the same criteria that teachers use and cited under "desirability" the importance of appropriateness to instructional, to organizational, and to student needs, and of nondiscriminatory

qualities under the intrinsic quality cluster. The NEA respondent stated that L-BR and teacher involvement in the products' development would be key product-development criteria. Organizations such as the Association for Supervision and Curriculum Development (ASCD) and the National Council of Teachers of English (NCTE) publish guides for selecting instructional materials. The ASCD guide, "Selecting New Aids to Teaching" (Miller, 1971), addresses items in all of our criteria clusters except product development and spinoffs. In the area of practicality this guide highlights the importance of qualities relating to organizational requirements and product-maintenance characteristics. For user effects the guide is concerned that adequate research supports claims and divulges comparative effects.

Organizations of and for Consumers

EPIE Institute is the only comprehensive consumer agency concerned with product screening. Its primary members include education practitioners especially in LEAs and lay groups. EPIE has a very sophisticated analysis and user review system and the most comprehensive list of criteria of any product decision-maker group we have examined. In recent years EPIE has highlighted the need for consumers and producers to examine products with respect to the congruence of their instructional design, an intrinsic quality dimension, and L-BR to assure adequate product development and revisions.

EPIE worked with a lay group, the National Committee for Citizens in Education, to develop product-review criteria for parents and other concerned citizens ("Fits and Misfits," 1974). These criteria are less comprehensive than regular EPIE criteria. In the user effects area, the items stress the importance of local pilot-testing and use. There are also many special interest groups such as the National Organization of Women (NOW), the Council on Interracial Books

for Children, and Women on Words and Images (WOWI), which review products only on criteria related to their missions, in these cases sex and race bias. The Schaffarzick study pointed out that, in general, local lay groups have little influence on many routine product-selection decisions. As members of official groups such as the school board, the lay public generally either "rubber stamp" previous reviewers' recommendations or become involved in such controversial areas as sex education where they frequently play a conservative or disapproving role. Many school districts are making sure that their screening procedures allow for community involvement and that they have adequate grievance and review mechanisms to avoid serious textbook controversies such as the 1974 Kanawha County, West Virginia, dispute.

IIb. Product Selecting by the Consumer/User

Administrator/Librarian/Curriculum Specialist

Administrators, librarians, and media and curriculum specialists commonly purchase materials for the users. As purchasers, they are often especially concerned with ensuring that those who actually select the products do so using appropriate procedures which require involvement of teachers, other specialists, and, occasionally, students and parents on selection committees. Actual user try-outs and evaluations are accomplished where possible. The higher the administrators are in their school system, the less likely they are actually to be involved in making specific product-selection decisions. However, they may veto the recommendations of selectors if they are short of funds or if they feel that the decisions were not responsive to community concerns or were otherwise poor decisions. Criteria of particular concern to the mid-level administrator -- including the librarian, the media specialist, and the curriculum specialist -- are practicality criteria, such as the availability of training in the use of the material; intrinsic qualities such as durability, attractiveness, social

fairness; and, occasionally, user effects criteria, such as student reading-improvement scores. At times the purchasers/selectors do not have adequate time and resources to identify and review purchase options and may take the expedient route of ordering from a convenient publisher's catalog at the end of a budget year. It is also generally believed that higher-level school administrators, such as principals, make final decisions about the more complex and expensive programs and products such as Individually Guided Education (IGE), while teachers make decisions about supplementary materials such as a science filmstrip.

Teacher

In the U.S. and even in other countries, such as France, teachers are playing a more active role in product selection. In some cases, publishers sell their products directly to the teachers who purchase them with school or their own personal funds. In other cases, teachers may select from a wide range of pre-screened product alternatives which are on approved purchase lists or which, especially in the case of supplementary materials, are available on a loan basis from the school district or an ISA group. In order to understand how teachers make selection decisions, it is helpful to attempt to answer the following questions:

- What do teachers actually see when they select a product?

In most cases, teachers see a brief publisher's catalog or flyer-type description. If they are lucky, they see the product or a sample part of the product. If the product is a filmstrip, they may preview it; if a textbook, they may also see some publisher's-supplied descriptive material such as a "scope and sequence" chart. Teachers rarely see evaluative or analytical information on the products and generally must also do their own analyses of the substantive differences as well as the qualitative differences among the alternatives. If the product

has been used in their school and the teachers are aware of such use, they may be able to obtain some views and opinions from their colleagues.

- How much time do teachers spend selecting products?

Preliminary results of an ongoing survey by EPIE (Komoski, January 1976) suggest that: "Teachers base about 95 per cent of their teaching time on the use of some type of instructional materials" and "they spend only from three to ten hours per year selecting instructional materials, and a still smaller amount of time analyzing the instructional strengths and weaknesses of the materials prior to selecting them or putting them in the classrooms."

- How do teachers select products?

Teachers frequently select products that they and others will use when serving as members of product-selection committees. Teachers are most likely to make selection decisions individually if the product is to be used primarily in their classroom and if they are renting or borrowing rather than purchasing a product. It has become apparent in some recent product-selection activities that teachers need help in judging products on many criteria. For example, teachers have trouble determining the validity of the content of teacher-training products or the credibility of the evidence which may be presented to support publishers' claims of effectiveness (Klein and McClure, 1975).

- Do teachers want to select products which have been screened?

The few teachers we asked, and other educators speaking for teachers, said that teachers do want to have the 500,000 educational products screened by others so that they can select from among the "best of the lot." However, it is likely that teachers who do select from among the prescreened alternatives are not likely to know who the products were screened by and on what bases the screened products were included or excluded from the "approved" lists. There have been some small-scale studies (Klein and McClure, 1975; Latham, 1973; Levine, 1974; McClure, 1976; and Sprigle, 1973) of teachers' use of product-selection criteria. Some

of these studies focus on the selection of teacher-training materials or instructional materials for handicapped students. Despite the differences in types of products considered for selection, teachers generally appear to be concerned with the following criteria:

• Desirability. All teachers interviewed mentioned the importance of desirability criteria such as appropriateness for students' age, acquired skill and vocabulary levels, and congruence with teacher values, instructional purposes, and teaching styles. Typical teacher product-selection questions relating to teaching style asked if the product could be used for individual as well as for group instruction, if it facilitated special types of student-teacher interaction, and if it contained diagnostic materials.

• Practicality. The teachers interviewed want a product to be easy for them and for the students to use. For example, they often asked if the product includes a teacher's manual, user-assessment materials, follow-up suggestions for student activities, and minimal teacher-preparation time, and if the students could use the material without teacher assistance. Teachers are also concerned with the degree of availability of the products and of the needed replacement parts, and with storage requirements and portability. In addition, they are concerned with price, the reusability of the product, and whether or not it is usable by more than one instructor. Furthermore, teachers want to know if they need to be trained to use the product and if flexibility of use is built into the product.

• Intrinsic Qualities of prime interest to teachers include: factual accuracy; currency; durability; attractiveness; clarity; readability and use of practical, realistic examples; and good illustrations and instructional qualities (such as appropriate sequencing of tasks, use of instructional objectives, allowance for appropriate practice, and learner reinforcement). Despite the current interest in race-, ethnic-, and sex-fairness criteria it is quite

surprising how few of the studies of teachers' use of selection criteria even mentioned these or any other criteria related to social fairness. For example, recently 14 teachers (male and female, black and white) were asked to brainstorm on what criteria they think would be important in selecting instructional products. Although these teachers mentioned items from all five of the major criteria clusters, they did not mention the need for examining products to determine if they were free of sexism, racism, and the like.

- Product Development. In general, the studies indicate that teachers are not particularly concerned with "product-development" criteria. In the few cases where teachers mentioned these criteria, they want to know if the authors are qualified, if the product was published by publishers which they favor, or if the product had been field-tested.

- User Effects. Teachers also want to know how the product affects the users. In the user effects criteria cluster, teachers asked questions about the ability of the product to hold learner interest over a period of time, about the ability of the students to comprehend the content, and about the product's "track record," including length of time required for the student to achieve the stated objectives. Teachers also asked about indicators of prior success, and whether the material is "safe" or, at least, not harmful to the users.

- Spinoffs. Under the spinoff criteria cluster, one teacher mentioned that when she previewed materials she often obtained instructional ideas that she could replicate with her existing resources.

Students

At the present time, students appear to have little direct influence over the selection of the instructional materials they use. For example, it is well known that publishers design and market their products in a way which is intended to appeal to the administrator or teacher purchasers rather than to the student (Brody, 1975). At the most, older students may be represented in instructional-

materials selection committees. Otherwise, students' opportunities to select materials have generally been limited to their choices of library books and individual learning resources. Some teachers try to select materials from a student viewpoint, but it is unlikely that they fully comprehend that viewpoint. In a recent pilot study, a 5th- and 6th-grade teacher attempted to guess which criteria items her students would think important. The next day she asked the students that question. As she surmised, the students thought that items in the desirability, practicality, and intrinsic quality criteria clusters were important. However, when the specific items within these clusters are examined some interesting discrepancies emerge. The teacher thought that under desirability the students would want a clearly stated purpose. The students did not mention this, but did, as the teacher predicted, express a desire for varied, concise, interesting material. Under practicality, the students stressed organization for ease of use, including indexes, tables of contents, and meaningful headings. Under intrinsic quality, the students expressed interest in the quality, depth, and accuracy of information. They also wanted the products to be durable and to have illustrations and interesting end-of-lesson activities to help them retain what they had learned. The teacher thought that the students would include freedom from race or sex bias in their criteria but they did not. She did say that when students worked with actual materials they identified instances of bias. As the teacher expected, the students did not care about product development or user effects criteria, both of which they probably didn't think about at all.

SUMMARY AND DISCUSSION OF WHO MAY BE USING WHAT CRITERIA

As can be seen in the appended "Summary Product Decision-Makers' Criteria Chart," preliminary findings indicate that all the product decision-maker groups con-

sistently used criteria in the desirability, practicality, and intrinsic quality clusters. Fewer groups felt that criteria associated with product development and user effects were essential and no groups indicated that spinoff attributes were essential.

- Product Development Decisions

Groups making decisions about product development, evaluation, and marketing maintain that five of the six criteria clusters are essential and that the spinoffs criteria cluster is applied least often. One of the major issues faced by those involved in using criteria to make product-development decisions is: How can these criteria be applied when products are in different stages of development? For example, one cannot expect to have user effects data at the time a new product is proposed except perhaps on some prototype unit of the proposed product.

- Product Screening Decisions

The consumer protection activities of the screening groups are poorly articulated, lacking, or overlapping. Federal agencies such as NIE, OE, and NSF, state education agencies, intermediate service agencies, local education agencies, and consumer organizations may all review the same product for similar purposes and make different decisions. An examination of the "Summary Product Decision-Makers' Criteria Chart" helps explain this divergence. Different product-screening groups use different criteria. Thus, a product may be approved by a state education agency based on adequacy on desirability, practicality, and intrinsic quality criteria, but judged as inadequate by other organizations which feel that the product is not sufficiently meritorious on product development and user effects criteria. It should be noted that even if all product-screening groups used identical screening procedures, criteria, and explicit operational standards to judge the same product, different people may still arrive at different recommendations. However, this is a minor concern given the present chaos related

to lack of consensus in using common review criteria and lack of procedures for the product-screening groups to coordinate their work and to communicate their decisions to other screening and product-selection groups.

III. Product-selection Decisions

The consumers or users generally do not know who reviewed any product, much less what criteria were applied in making product-screening decisions. If a product were screened but still found some path to the user (such as via direct publisher contact), the user might not know that the product was ever reviewed and why it was not approved. Even if the product were approved, that fact, the reasons for approval, and the criteria used, are unlikely to reach the consumer/user. The difficulties involved in product selection are compounded when a user must choose from some 500,000 available education products, only some of which have been screened, and has extremely limited time in which to do so.

However, the problems become more complex when one tries to select products which will satisfy administrators, teachers, and students as well. As the "Summary Product Decision-Makers' Chart" suggests, these three groups, if they are selecting products for their own use, may use different criteria. For example, if they had a say, students might reject a product selected by teachers or administrators because it didn't have full-color pictures or sufficient variety. Similarly, teachers might want to reject a product purchased by an administrator because it didn't have evidence of positive user effects, a criterion on which teachers, even more than administrators and screeners in state and local education agencies in this pilot survey, felt is important.

ASSUMING THE ACCURACY OF THIS IMAGE OF DISCONSENSUS, CAN WE ACHIEVE CONSENSUS ON MINIMUM CRITERIA FOR EDUCATIONAL PRODUCTS?

Yes	No
1. Is it desirable to try to establish minimum common criteria for educational products?	
• The appropriate selection of products is important because "teachers base about 95 per cent of their total teaching time on the use of some type of instructional materials" (Komoski, 1976). This adds up to 47½ billion hours of school instruction per year and the materials alone cost over 900 million (Komoski, 1976).	• Some think that education products are unimportant because a good teacher can teach with anything.
• In the U.S. alone there are probably more than 500,000 instructional materials, most of which are supplemental media materials. However, it is even difficult for reviewers and users to cope with the estimated 19,000 primarily print-based instructional programs (Komoski, 1976).	• Others think there is little qualitative difference in the products designed to accomplish similar purposes and that attention should be given to the adequate implementation rather than the adequate selection of products.
• The current screening and selection procedures are generally not operating rationally, systematically, or efficiently for some of the following reasons:	• The screening- and selection- procedures are not likely to be helpful since they tend to operate in an unrealistic, negative, restraining, censoring fashion for the following reasons:
- Teachers and others have very limited time to spend in making product-screening or -selection decisions. They want to be informed of the "best" or "exemplary" alternatives.	- Teachers and others will generally select what is most easily available or familiar. It is much easier to make reactive, expedient decisions based on sales or political pressures than to make active decisions based on analysis of user constraints and product attributes.
- Screeners and selectors rarely have credible summary information about the product which allows them to make a credible judgment about criteria which are not immediately obvious from a quick examination of the product itself. If there were minimum common criteria, product decision-makers would be in a better position to require and obtain this comparative summary information.	

Yes	No
- In making judgments, screeners and selectors have almost no operational standards for each criteria item. They also have limited information on how other products fare on similar criteria. If common criteria were established it would be possible to develop these operational standards.	- There are insufficient resources to prepare objective summary information that would be responsive to product criteria. It is not to the advantage of the major group with resources -- the producers -- to prepare this information because they are unlikely to wish to comment on weaknesses of their products.
- When screeners and selectors do use a systematic criteria checklist, the lists are often incomplete. For example, sex- and racial-fairness criteria are frequently inadvertently eliminated from these criteria lists. The use of common minimum criteria would identify the basic criteria list. Other criteria could be added on an optional basis.	- It is impossible to compare products since each is different and each product use in unique. - Comprehensive lists of criteria would be too tedious and unlikely to be used on a routine basis.
• Common criteria would make it more feasible for product producers to develop high-quality products in desired instructional areas and to collect and present evidence about those desired product attributes. They would also waste less time preparing supporting statements in ten different ways.	• Producers may not be interested in achieving quality on all criteria dimensions, or if minimum criteria are established there may be less incentive for publishers to strive for excellence.
• At the moment, the screening groups are doing little to help the consumers locate a small group of appropriate alternatives from which to make their final selection decisions. Greater articulation among screeners, including assigning specific criteria to each of those groups, may help. (To do this, a core set of common minimum criteria would be used after the product was reviewed by several groups, but no one group would be responsible for detailed examination of the product in relation to all the criteria).	• The selectors eventually need to make the final decision on the use of the product; thus it is wasteful and unnecessary to have others screening for them.

2. Can minimum common criteria be established?

• Some think that checklists for minimum common criteria can be created for each criteria cluster and for some specific items such as sex fairness within each cluster. Most of those interviewed thought that this would be most feasible for "practicality," "intrinsic quality," "product development," and "user effects" clusters.	• Others thought that checklists for minimum common criteria would need to be so general that they would be useless in discriminating among various product quality attributes.

Yes

- It is technically feasible to select some core criteria and to develop operational definitions for these criteria and even standards for judging the criteria. Several comprehensive criteria lists have already been established and training materials and programs developed to help product decision-makers apply them consistently.

- Although at the present time criteria are not used consistently among the product decision-maker group, this inconsistency may be attributed to accident rather than to real differences in the importance of various criteria for each group. Many of the current differences in criteria used by each group are apt to be semantic differences or differences in temporal focus rather than "truly" substantive differences of opinion. These differences are of such a minor nature that it would be possible to identify and adopt minimum common criteria.

No

- It is also possible that different minimum criteria will be needed for product and program decisions and for decisions about various types of products such as textbooks or library resources.

- They also pointed out that there are many reasons for making product decisions and that criteria for the different development, screening, and selection purposes vary.

- Some think that it is important to involve each group in developing the criteria so that the criteria will be appropriate and so that the criteria will be used.

- Others point out that the articulation and the division of responsibility among the seven screening groups and the three selection groups will be difficult if not impossible due to the fractionation of education responsibilities in the U.S.

STRATEGIES TO MOVE TOWARD CONSENSUS ON ESTABLISHING MINIMUM CRITERIA

If we decide that it is desirable to move toward consensus on establishing minimum product-review criteria, the following strategies may be employed:

(1) Conduct a survey to check the validity of the preliminary findings on criteria reported here. Also, collect information on locations using criteria rationally and effectively. It is likely that there is more consensus that we think. We can work to establish minimum criteria in criteria clusters which are important, but which are less apt to be influenced by the decision-maker's unique needs. For example, intrinsic quality criteria would be a more stable priority area than desirability.

(2) Perform some empirical research to determine which criteria are most helpful or predictive for good product decision-making.

(3) In areas where the surveys showed little consensus and where there is no empirical justification for the criteria, conduct consensus building activities using representatives from the key constituent groups to develop common criteria.

(4) Develop model legislation or regulations for state and other education governing authorities.

(5) The federal government or consumer groups could lead in developing and applying in a standardized fashion certain common criteria to their own programs.

(6) Core criteria of interest to specific users could be identified and addressed during the development of product information dissemination systems, catalogs, etc.

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What Do You Consider Minimum Criteria for Educational Products?

DIRECTIONS: In the far left column, please circle your major education product decision-maker role(s). Then indicate your rating of minimum criteria in the column to the right by marking: +, for essential criteria; o, for desirable criteria, and –, for unimportant criteria. Circle key items within these criteria clusters. At the bottom of the page, make a check-mark under any clusters where you think it is possible to establish *common minimum* criteria at some useful level of generality for all the decision-maker groups listed here.

SUMMARY: PRODUCT DECISION-MAKERS' CRITERIA CHART

Criteria Clusters

	Desirability	Practicality	Intrinsic Quality	Product Development	User Effects	Spinoffs
	• need • appropriate for intended users • community acceptance: adherence to social, moral, and instructional values, etc. • demand	• adaptability • ease of use • reasonable fiscal and psychic costs • availability and accessibility to users • ability to receive any needed training to use product	• sex, race, ethnic, age, socioeconomic fairness or balance • content accuracy and currency • instructional quality, congruence of design, clarity, clear purpose • technical quality of physical features of materials • attractiveness	• learner-based revision or learner verification and revision • quality design and rationale • expert staff	• types of effects: cognitive skill, performance, attitude, motivation, learning rate, attendance, impact on others, harmfulness • credibility of evidence supporting claimed effects	• model for other work • contributes to knowledge
I. Product Development						
• developer	+	+	+	+	+	o
• publisher	+	+	+	+	+	o
• fiscal sponsor	+	+	+	+	+	o
II. Product Screening; Consumer Protector; Disseminator						
• federal agencies concerned with education	+	+	+	o	+	–
• state education agency	+	+	+	o	–	–
• intermediate service agency	+	+	+	o	+	–
• local education agency	+	+	+	o	o	–
• expert organization; higher education; R&D and evaluation; testing organization, etc.	+	+	+	+	+	o
• organization for education personnel users: NEA, AFT, AASA, ASCD, etc.	+	+	+	+	+	–
• organization for or of consumers, including noneducational practitioners, EPIE, citizens groups, PTA, NOW, Council on Interracial Books, etc.	+	+	+	+	+	–
III. Product Selecting by the Consumer/User						
• administrator	+	+	+	o	o	–
• teacher	+	+	+	o	+	o
• student	+	+	+	–	–	–
CHECK (✓) CLUSTERS WHERE IT MAY BE POSSIBLE TO ESTABLISH MINIMUM COMMON CRITERIA						

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I. Product Development						
• developer						
• publisher						
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• federal agencies concerned with education						
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• expert organization; higher education; R&D and evaluation; testing organization, etc.						
• organization for education personnel users: NEA, AFT, AASA, ASCD, etc.						
• organization for or of consumers, including noneducational practitioners, EPIE, citizens groups, PTA, NOW, Council on Interracial Books, etc.						
III. Product Selecting by the Consumer/User						
• administrator						
• teacher						
• student						
CHECK (√) CLUSTERS WHERE IT MAY BE POSSIBLE TO ESTABLISH MINIMUM COMMON CRITERIA						

B. Criteria Acceptable to the Educational Developer

by John E. Hopkins
Research for Better Schools

Let me begin the individual presentations by discussing the criteria acceptable to the educational developer -- the producer of these things we are so concerned about.

When I think of the educational developer's role in this matter, I get a mental image of the developer, like Atlas of ancient mythology, trying to balance the bulk of a huge inverted pyramid of legislation, criteria, and expectations, while simultaneously striving to be imaginative, daring, efficient, and effective in creating a solution to an educational problem. If you develop a similar image as you listen to the presentations which follow, then, perhaps, you will understand why I expect to be the defensive one on the panel today.

Since ten minutes is not very much time, let me just assert a couple of things at the outset.

1. I endorse completely the concept of examining and assessing educational products and programs on a wide variety of bases, but I believe that until we have greater understanding of the consequences of employing these criteria, any effort to require any large number of them would be a huge error. I'm afraid that such a move would signal the end of the very kind of careful, thorough development most of us are trying to encourage, because it would make that type of development much too expensive and too time-consuming.
2. I support the effort currently being made to compile lists of criteria appropriate for use in reviewing educational products and programs. If we are ever going to deal with the creature,

we must first know its dimensions and characteristics. But I do want to stress that we are still a long way from consensus on what constitutes a comprehensive and accurate list of the pertinent criteria, let alone consensus on which of them are of greater importance than others. It is still very early in this particular ball game and anything can happen.

To illustrate the point, I have made available copies of a list being generated by Alan Coller of Research for Better Schools. Let me point out two things. First, there are differences in the way Alan Coller has classified certain criteria and the way Sue Klein has classified apparently the same criteria. This is not to suggest that one is right and the other wrong, but to illustrate that we aren't in agreement on how to classify review criteria, let alone how to interpret, rank order, or apply them.

Second, you will note that the Coller list is incomplete in two respects. Alan has taken just the first category (Adoptability) and carried it to greater levels of detail. That task still remains to be done on the remaining five categories (Intrinsic Quality, Desirability, etc.). Note for yourselves the large number of criteria he has identified already (68 by my count) and he hasn't finished the list! This illustrates for me, at least, that the practical problems of applying criteria in the review of educational products and programs are too many, and too great, to be imposed to any great extent on the educational developer now.

The other way in which the Coller list is incomplete is that

each of the individual listings still must be backed up with definitions which are mutually exclusive but, in toto, all-encompassing, with standards for judging each, and, if they are to be of practical benefit, with evaluation questions appropriate to be asked under each of them. I think this, too, indicates how very far we are from that point where we can have some confidence in making recommendations with regard to the criteria appropriate for use in reviewing educational materials and programs and how risky it would be to settle in on a particular set of requirements now.

With that as my attempt to illustrate the magnitude of the problems involved in the review of educational products and programs, let me move on and devote the remainder of my time to the matter of which criteria I believe would be at least temporarily acceptable to the educational developer. As I do so, I will use Sue Klein's classification, rather than Alan Coller's so that we will have a common base for discussion.

Deciding which of the many possible criteria to include and exclude from a minimally acceptable set is a difficult task, as I'm sure my associates on the panel will agree. That's because the decisions are largely idiosyncratic to each product and program. Whether or not "social acceptance" is an important criterion depends on whether you're examining a classroom curriculum product or a self-help training manual for administrators.

On a per-product basis, I would use a criterion matrix to help identify the criteria most appropriate for use. I would list in the left column the full range of criteria which had been identified. As the column heads across the top of the matrix I would list (1) target population, (2) type

of product, (3) sponsor's expectations, (4) purpose of the developmental effort, (5) legislative mandates, etc. Appropriate rankings could be made in such a matrix for each product being considered for review.

In looking at the question of which criteria ought to be applied as a minimum to all products, I follow the free enterprise model. That is, I believe developers can reasonably be required to meet criteria which assure the harmlessness of the product on potential users, but that from that point on there should be no further requirements and the market place should simply be allowed to work its will. Stated another way, I believe that government, distributors, and developers themselves have a responsibility to guard the public from harm, and should actively seek to meet that responsibility by establishing prudential criteria and standards, but that the dangers of proceeding beyond that point are greater than the protections which would be obtained. In my view, these dangers would take the form of undue government influence, censorship, a reduction in available alternatives, and possibly the cessation of large segments of the development industry under the burden of a mountain of regulation and legislation.

If you will look with me at the column heads on Sue Klein's questionnaire, I will indicate what I think are the implications of application of the free enterprise model to the various criteria which appear there.

The first column, labeled "Desirability," contains criteria most appropriate to the pre-development, or needs assessment, phase of a developmental effort. Such matters as the need for the product, demand for the product, and so forth are appropriate for discussion at that point between the potential sponsor and potential developer, but, in my opinion, are not pertinent to the question of whether a completed program or product

can or ought to be released for general use. I would not include any of these criteria among the minimum set to be required for release of a product or program.

The criteria in the second column, under the heading "Practicability," seem to me to apply to the marketability of the finished program or product. These are important considerations, all right, but whether or not there is an assured market for a program or product is, I submit, not crucial to whether they ought to be made available to the marketplace, and I would not include these criteria among the minimum set.

Moving for a moment to the extreme right hand column ("Spinoffs"), I regard the effects listed there (model for other work, contributes to knowledge) as bonus effects which might be obtainable from programs or products specifically designed to be "models," or to test a set of developmental hypotheses, but not pertinent to all programs or products and, therefore, not among the minimum set of criteria which ought to be applied for a program or product to be released.

Some, but not all of the criteria in columns three, four, and five do seem to me to be relevant to the matter under examination. In column three, Sue has included "technical quality of physical features of materials" and "attractiveness (of materials)" under the heading "Intrinsic Quality." I would have listed these in the second column, and, as I have already indicated, I consider these marketability criteria not applicable to the release or not release decision.

The other criteria in column three include one I would include among the minimum set: the criterion of social balance or fairness. More will be said about this is a few minutes.

The remaining criteria in column three are "content accuracy and currency" and "instructional quality, coherence of design, clarity, (and) clear purpose." These seem to me to be matters of prudential concern to the sponsor of the product, and ones which most would hope would be of concern to curriculum selection committees. I submit they ought not be legislated as being among any required minimum set, however, because of (1) the lack of general agreement on content (e.g., the differing theories on the creation, the Great Books versus "relevance" schools of thought), (2) our inability to substantiate empirically the virtues of various instructional designs, and (3) the wide variations in purpose which exist throughout the country.

I would exclude the criteria in the fourth column, labeled "Product Development," because they have to do with technical aspects of the process and not the outcome. Some may believe that particular developmental methods or certain staff credentials have a strong bearing on the quality of the program or product which is produced. But there is no evidence to support such a belief, so procedural requirements ought not be included among any minimum set of required criteria.*

Finally, in the column labeled "User Effects," is the major criterion I would endorse as appropriate to apply to any new program or product before

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*"Learner verification," which is included in column four, is a process for product improvement after its release, so I have excluded it from this discussion of release criteria.

its release.* Evidence on the effects of the new development -- primary and secondary, anticipated and unanticipated, cognitive and affective, physical and psychological -- is a fair minimum requirement. To pick up on an earlier comment, I would include evidence on social balance, or fairness as another one of the acceptable minimum requirements. I see this as actually being one of the types of "user effects," because its impact is primarily as a psychological effect, but I concede that the topic now has gained enough political overtones that it is not unreasonable to consider it (social balance) as a criterion apart from its effects on users.

These are the minimum criteria, and the only criteria, then, which I see as being legitimately required of developers at the present time. Other criteria may be required by sponsors or implicit in the development effort itself, on a product by product basis, but to go beyond the application of user effects criteria on a universal basis is, in my opinion, risky, not sensible, and a danger to the continued existence of a large segment of the development industry as we now know it.

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*The other criterion in column five, credibility of evidence, is part and parcel of the evidence, in my view, and therefore not distinguishable as a separate criterion. Would anyone give credit for a categorical requirement having been met if the evidence offered were incredible?

Preliminary Statement: Categories or Criteria Which May be Used in Evaluating Change Process Activities or Functions (Including Products)

1.0.0.0.0. Adoptability..

1.1.0.0.0. Acceptability.
1.1.1.0.0. Balance.
1.1.2.0.0. Compatibility.
1.1.3.0.0. Legality.
1.1.4.0.0. Legitimacy.
1.1.5.0.0. Pertinence.

1.2.0.0.0. Exportability.
1.2.1.0.0. Integrity.
1.2.1.1.0. Completeness.
1.2.1.2.0. Unity.
1.2.2.0.0. Independency.
1.2.3.0.0. Conveyability.
1.2.4.0.0. Availability of Invention.
1.2.5.0.0. Availability of Services.
1.2.6.0.0. Trainability.

1.3.0.0.0. Feasibility.
1.3.1.0.0. Reasonableness of Costs.
1.3.1.1.0. Economical Soundness.
1.3.1.2.0. Cost Competiveness.
1.3.2.0.0. Affordability.
1.3.3.0.0. Implementability.
1.3.3.1.0. Resource Availability.
1.3.3.2.0. Resource Recommendations.
1.3.3.3.0. Resource Requirements.

1.4.0.0.0. Flexibility.
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Developed by Alan R. Coller
Evaluation Specialist
Research for Better Schools, Inc.
February, 1976

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5.0.0.0.0. Impact.

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5.3.1.0.0. Simple Impact (See Desirability).
5.3.2.0.0. Problem-Simple Impact (See Desirability)

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6.1.0.0.0. Cost/Efficiency.
6.1.1.0.0. Continuance.
6.1.2.0.0. Real Costs

6.2.0.0.0. Process/Efficiency.
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6.3.1.0.0. Real Resources.
6.3.2.0.0. Resource Requirements.

What Do You Consider Minimum Criteria for Educational Products?

DIRECTIONS: In the far left column, please circle your major education product decision-maker role(s). Then indicate your rating of minimum criteria in the columns to the right by marking: +, for essential criteria; o, for desirable criteria, and –, for unimportant criteria. Circle key items within these criteria clusters. At the bottom of the page, make a check-mark under any clusters where you think it is possible to establish *common minimum* criteria at some useful level of generality for all the decision-maker groups listed here.

SUMMARY: PRODUCT DECISION-MAKERS' CRITERIA CHART

Criteria Clusters

	Desirability	Practicality	Intrinsic Quality	Product Development	User Effects	Spinoffs
	• need • appropriate for intended users • community acceptance: adherence to social, moral, and instructional values, etc. • demand	• adaptability • ease of use • reasonable fiscal and psychic costs • availability and accessibility to users • ability to receive any needed training to use product	• sex, race, ethnic, age, socioeconomic fairness or balance • content accuracy and currency • instructional quality, congruence of design, clarity, clear purpose • technical quality of physical features of materials • attractiveness	• learner-based revision or learner verification and revision • quality design and rationale • expert staff	• types of effects: cognitive skill, performance, attitude, motivation, learning rate, attendance, impact on others, harmfulness • credibility of evidence supporting claimed effects	• model for other work • contributes to knowledge
I. Product Development						
• developer						
• publisher						
• fiscal sponsor						
II. Product Screening; Consumer Protector; Disseminator						
• federal agencies concerned with education						
• state education agency						
• intermediate service agency						
• local education agency						
• expert organization; higher education; R&D and evaluation; testing organization, etc.						
• organization for education personnel users: NEA, AFT, AASA, ASCD, etc.						
• organization for or of consumers, including noneducational practitioners, EPIE, citizens groups, PTA, NOW, Council on Interracial Books, etc.						
III. Product Selecting by the Consumer/User						
• administrator						
• teacher						
• student						
CHECK (✓) CLUSTERS WHERE IT MAY BE POSSIBLE TO ESTABLISH MINIMUM COMMON CRITERIA						

C. Comments on the Quest for Common Criteria

by P. Kenneth Komoski
Executive Director, EPIE Institute

I assume that the reason that I have been invited here today as an add-on member to this already very full symposium is to share briefly with you the results of eight years of experience in working toward "...common criteria for the review of the quality of educational products." This experience has been accumulated by the staff, contributing consultants, and school users of the country's only independent, not-for-profit, consumer-supported educational products information exchange.

The output of this ongoing working experience is currently being used by educational consumers in one out of ten school systems in the U.S. and Canada. These school-system users make up the greatest portion of the cost-sharing constituency that contributes to the financial base of this work.

The contributing consultants, many of whom come from these same school systems as well as from universities, make up the care-sharing constituency that helps provide the necessary breadth of professional expertise and energy not possible to maintain within the small professional staff that coordinates and disseminates the results of this work.

Another more loosely related constituency is made up of national professional associations such as the National Education Association, the International Reading Association, the National Council of Teachers of Mathematics, and the Association for Educational Communications and Technology, which assist the staff, in an advisory capacity, in enlisting consultants or in the gathering

and/or the disseminating of the product information produced by this work.

Having given this bit of background, I want to make five points about this ongoing work that are relevant to the topic of this symposium:

- The first point is that this work could not have managed to grow over the last eight years and maintained the interest and cooperation of these constituents without a good deal of implicit agreement on the part of constituents as to an array of criteria that are useful in reviewing the quality of educational products by potential purchasers and users of such products.

- The second point is that I don't believe the work could have managed to grow if it had set out with the announced objective of achieving agreement on evaluative criteria.

- The third point is that at no time has the work found itself moving toward a minimum set of criteria. Rather, it has, over these eight years, found itself consistently being moved by supporting, contributing and advising constituencies toward a maximum nontrivial set of criteria.

- The fourth point is that different subsets of these criteria are used by different educational consumers, or by the same consumers at different points in the consumer process.

- The fifth point -- and a very important one -- is that in carrying out this work it has become increasingly apparent that educational consumers are, indeed, engaged in a very complex, ongoing process, one that needs to be studied and improved.

That consumer process usually starts by someone's applying a subset of criteria to an exercise sometimes called screening. This exercise is most often necessitated by some explicit legal, or social, or fiscal constraints or requirements. The consumer process ends with the cessation of a product's use, usually based on the application of a whole array of implicit or unexamined criteria. The consumer decisions made at the screening stage usually deal with broad judgments related to whether or not a product fits into the legal, fiscal, or social boundaries operating within a community at a given time, and these screening criteria change as those boundaries change. At the cessation of a product's use, broad judgments are also being made that relate to the conclusion

that the product no longer fits the curriculum, the teachers, or the students as well as it once did or was thought to have done, or as well as a competing product is thought to be able to.

Between the broad judgments involved in screening for use and those judgments having to do with the cessation of use are a host of much more specific judgments that very often don't get made -- or if they are made are not made consciously. These judgments are related to the making of a complex three-way fit of product-teacher-learner and maintaining that fit in order to facilitate learning. The criteria used to make the judgments that lead to an effective three-way fit across product-teacher-learner constitute the crucial core of the total consumer process. But because so few of our constituent consumers have as yet addressed themselves to what must in time emerge as the central concern of all educational consumers, the criteria now operating within our cooperative efforts are no doubt far from complete.

This brings me to another point which is that, except in a few of the more well organized, so-called "adoption states," school consumers tend not to be aware of the complexity of the process or of the point in the process at which they happen to be at a given moment.

Despite these difficulties, this cooperative work progresses and seems to be of value to these consumers who are helping to support it.

In order to give these supporting consumers the most for the support they are providing and in order to enable them to make the most of the limited time they have in which to play their complex role as educational consumers, the work is of necessity guided by fiscal, operational, and editorial parsimony. From time

to time when the fiscal parsimony gets to be too much of an operational constraint, we seek (and to date have been fortunate in finding) support from private foundations. But operationally and editorially the work is parsimonious by design because of the need to provide data related to the broad array of criteria that are used by our consumer constituency. Without such parsimony the data would overwhelm us and, more unfortunately, our consumer constituency. The data which are organized under the ever-expanding criteria being used by consumers may be broadly described as data related to the facts (objective, descriptive data), findings (as objective as possible analytical and empirical data), and feelings (clearly subjective data). Organizing these data under a broad array of maximum nontrivial criteria categories gives the educational consumer the opportunity to select out and to apply those criteria that are most relevant to the particular phase of the consumer process at which the consumer is functioning at any particular time, whether aware of it or not.

For instance, the appended data displays are typical of what this eight years of work is currently delivering to our consumer constituency. Sheet 1 is simply a copy of the index of EPIE Report: Number 71 from which two sample data displays that follow on Sheets 5-10 have been copied. There are 31 such displays in the actual Report. On Sheet 2, titled "A Tour Through EPIE Report: Number 71," the first column describes the process by means of which the following data displays were developed by EPIE-trained analysts. The second column describes the way these displays of data on competing products may be used in screening, selection, and use decisions by educational consumers. I quote from the first and second paragraphs of that second column:

> EPIE analyses can assist educators in helping them determine which products come closest to their stated needs and therefore deserve detailed examination and trial use. They also can help in offering guidance on just where and how to use products already on hand: with teachers and students who show

characteristics particularly well served by a given product; by suggesting how to add to, or adapt, products; or by suggesting how to adapt instructional settings to products. A number of the products reported on -- although they are included because they are designed primarily to serve as basic material for either a year or for a semester -- lend themselves to the sort of partial use which enables a teacher to supplement another basic product in any of the four constructs: intents, contents, methodology, means of evaluation.

The analyses are arranged to permit easy comparison: Exactly the same format is used for each analysis, and the same characteristics are commented on for each product. The analyses appear alphabetically, by publisher.

Sheets 3 and 4 contain a general display and description of the criteria/data categories used in the sample data displays that follow. The last column on Sheet 4 provides comments related to the use of the data resulting from an analysis of the values and/or the approach to valuing taken in each of the secondary school social studies materials included in this particular EPIE Report. (I should point out that values and valuing analysis is a new addition to our work, one brought about largely by the increasing attention being paid by citizen groups and educators to the values found implicit within instructional materials and the attempt on the part of many developers explicitly to teach the valuing process, or about it.)

Before we turn to the two sample data displays themselves, a word is in order about the next addition to be made to such data displays. As currently constituted, these data displays contain factual descriptive data gathered from the product developer and data observed by a trained analyst in each product. (At present there are some 300 such trained consultant analysts in this country and Canada who contribute to this work.) The main task these analysts perform is to state as objectively as they can their findings about a product as they apply the analytical system they have been trained to use. This system is

embedded in EPIEform A which is the ongoing, growing product of part of our eight years of effort. Each product receives multiple analyses based on this system, the results of which are synthesized by a trained synthesizer and readied for display. In addition to providing these analytical findings, each of the analysts is invited also to record any feelings they may have about the product in a section that appears following the synthesized analytical findings. These "feelings data" in the form of comments or quotes are sometimes displayed verbatim.

What these data displays do not yet contain, but which is soon to be added, are data based on findings and feelings about each product gathered from product users (i.e., teachers and students and, in some cases, parents who, for instance, may use the product in helping a child with homework). These data are currently being gathered through a National Survey and Assessment of Instructional Materials, which we have been conducting for almost two years with the support of Lilly Endowment. This survey and assessment aspect of our work is envisioned as the beginning of a long-needed longitudinal data base on instructional product use.

Turning now to Sheets 5 through 10, you will find sample displays of two competing secondary school social studies products. The first of these products was developed by a federally funded project at a university. The second was developed by a private company. The two displays have been selected as samples because, in viewing them, you may wish to imagine that we are at a penultimate step in the product-selection process. That is, you are selecting a product for use in secondary school social studies. Early in the process you decided that you were looking for an inquiry-based program in American history. You have already screened the 31 secondary school programs in this EPIE Report and found that 16 of them are American history programs, and that of these 16

there are four that meet your criteria for an inquiry program. You then have studied the data displays and found that the scope and methodology of these two programs fit into your school's curriculum plans and your teaching methods better than the other two. Now your task is to consider some of the other criteria that are important to you -- and perhaps to you alone -- in making the decision as to which product fits best into what you want to do as a teacher. But in making that decision, and in every previous decision, you should also be concerned with how well that product will fit your learners. Before you do this, you really ought to get hold of the product and try it out on some students and question them in such a way that a good material-to-teacher-to-learner fit becomes more a probability than a possibility.

In summary, let me say that our immediate objective is to concentrate on providing the educational consumers who are supporting our work with decision-focused data on the facts, findings, and feelings that relate to the multiple criteria they are using in reaching decisions in screening, selecting, and using products in reading, mathematics, science, and social studies. Our long-range goal is to help those consumers to understand more about the complex process they are engaged in. In both our immediate and longer-range work, our overriding concern is guided by one of the general findings of our national survey: that teachers of reading, mathematics, science, and social studies tell us that 95 per cent of the instructional minutes they spend with their students are organized around and involve the use of instructional materials. This finding, as well as a number of others that would take more time than we have here today to go into, seem to point to the importance of improving every phase of the educational consumer process from screening, to selection, to properly fitting products to teachers and learners during use, and even to the decision to abandon a product or an array of products.

The task ahead is enormous, so enormous that it is difficult to predict how far or exactly where our work will take us during the next eight years. It is exciting and deeply satisfying work and we welcome anyone with the time and inclination to take part in what those of us who are involved in it feel is working, in part, because it has grown into such a cooperative, cost-sharing, care-sharing, independent venture of concerned professionals.

Sheet 1

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A "TOUR" THROUGH EPIE REPORT: NUMBER 71

A BACKGROUND NOTE

In preparing this *EPIE Report,* the Social Sciences Education Consortium assisted EPIE Institute in identifying analysts and in providing most of the materials. Approximately 30 reviewers met with EPIE personnel in Boulder, Colorado (home of SSEC), to become familiar with EPIE's system for analyzing the instructional design of materials, and to apply this analysis system to the materials on hand in SSEC's extensive collection of social studies materials. (EPIE's system was originally developed by Maurice Eash, Director of the Office of Evaluation Research at the University of Illinois, Chicago Circle Campus, and subjected to trial use and revision with Dr. Eash's advice.)

Added to the EPIE system, specifically for use in analyzing social studies materials, was a series of probes into how developers deal with the complex issue of values. Douglas Superka, a member of the SSEC staff who specializes in values, developed and refined the probes on the basis of trial use before the reviewers used them on the materials analyzed for this *EPIE Report.*

For the most part, the reviewers worked as teams of two, resolving discrepant answers to questions by discussion, or, if necessary, by referral to a third analyst. Their analyses, in the form of annotated responses to multiple-choice questions, plus short statements of professional opinion, were consolidated by EPIE staff members into the descriptions which form this report.

It is indeed a pleasure to express EPIE's gratitude to SSEC staff and consultants for their professional help and for the use of their facilities and materials.

HOW TO READ THE ANALYSES

The analyses of 31 secondary school social studies materials in this *EPIE Report* are based on searches into the instructional design of the products. Design elements are: the way the developers have dealt with the *intents* of the products, the organization of the *contents* of the products, the *methodology* for the use of each product, and the *means of evaluation* of learning which each product provides. Because they were developed systematically, on the basis of a careful and comprehensive analysis plan, the analyses permit comparison among similar products. These analyses are useful in a broad spectrum of instructional settings because they are objective: Analysts' opinions are sought but not given until *after* the objective descriptions have been presented.

EPIE analyses can assist educators in helping them determine which products come closest to their stated needs and therefore deserve detailed examination and trial use. They also can help in offering guidance on just where and how to use products already on hand: with teachers and students who show characteristics particularly well served by a given product; by suggesting how to add to, or adapt, products; or by suggesting how to adapt instructional settings to products. A number of the products reported on – although they are included because they are designed primarily to serve as basic material for either a year or for a semester – lend themselves to the sort of partial use which enables a teacher to supplement another basic product in any of the four constructs: intents, contents, methodology, means of evaluation.

The analyses are arranged to permit easy comparison: Exactly the same format is used for each analysis, and the same characteristics are commented on for each product. The analyses appear alphabetically, by publisher.

One note before we go to a guide for reading the analyses: Readers accustomed to *EPIE Reports* will notice a major addition to these analyses – an attempt to get at the authors' or the developers' way of dealing (if at all) with *values.* Because this feature is a new one for us (and was new as a point of analysis for most analysts), it requires a whole glossary of terms not until now in EPIE parlance. That glossary appears at the end of the guide.

The analyses are divided into six major sections; this guide is similary arranged. The first section (Identification and Background) provides identifying details about the product, and the last (Additional Considerations and Comments) reports the analysts' final thoughts about the product, dealing with some considerations which, although not exactly part of the design, could influence decisions about trying a program. In the middle are sections which deal with the four constructs of instructional design (Intents, Contents, Methodology, and Means of Evaluation). In each case, EPIE asked the analysts to report first on how the developer provides for a construct (if at all, for often the developer gives the user an entirely free hand in devising a methodology, say, or a means of evaluation) and then to give their opinions as to whether the developer's handling is internally consistent and congruent with the other characteristics of the product.

Sheet 3

First Column: Identification and Background

Here is recorded the identity of the product *as the publisher gives it* – not only the name, the author(s), the publisher, and the component parts and prices, but also where in the curriculum the publisher intended the material to be used and with whom: the stated curriculum role and target population. (Analysts may comment on or argue with the publisher's placement later in the analysis.) Also in this section, analysts report briefly on whether the publisher includes with the product any R&D information, i.e., field trials to demonstrate that learning takes place; revisions based on results of trial use with learners; or plans to monitor the use of the product in operation, with a view to improving it.

Second Column: Intents (the first construct)

Developer's Rationale: Why did the developer produce the material: to serve a particular subject-matter emphasis (the use of principles of economics to examine contemporary society), to meet a societal need (for disadvantaged learners), to supply material for a particular instructional management or approach (individualized instructional materials, "discovery" materials, programed materials), to facilitate acquisition of a particular kind of knowledge or skill (concept formation, problem-solving), to create an "affect" (to change attitudes, to teach values or valuing)?

If values education is a part of the material, how does the developer approach the matter? How explicit is the values teaching?

Learner Goals: What broad, general outcomes (to recognize concepts in American history and relate them to current problems) does the developer expect learners to gain from use of the product?

Learner Objectives: What specific behaviors which contribute to attaining the broad goals (being able to explain why racial minorities increasingly assert their cultural values) does the developer expect learners to gain from the use of the product?

Third Column: Contents (the second construct)

Scope: What subject matter or skills are covered? How often? Only once, or more than once? At different levels? Through different media? Does the developer recommend: (a) supplementing the scope with other materials? (b) omitting some of the content for certain students?

Sequence: Is there a specific order in which learners meet these materials? If so, what is it based on? Do all students start at the same point and follow the same route, or do individual abilities and interests mean variations in sequences?

Accuracy and Fairness: Here analysts report situations which they notice in the course of analysis. They are *not* asked to make the exhaustive examination which would be necessary to state categorically the degrees of accuracy and fairness which characterize a product.

Values and Valuing: What is in the content that teaches *for* or *about* values, or valuing skills? What approach to values education and what value systems are reflected in the content?

Fourth Column: Methodology (the third construct)

Presentation and Description: Is there a separate guide for the teacher, or an annotated edition of the text for the teacher, or an audiovisual presentation, or a combination to help the teacher use the product? How detailed and structured are the instructions (if any) for the teacher? What goes on in the classroom when the product is in use?

Learning Environment: Is the environment *open* (flexible to allow for individual options, alternative modes, or such) or *structured* (set up so each student meets the product in exactly the same way, even if at different times) or a *combination* (open for some learners or activities, closed for others)? Is an atmosphere of rapport between teacher and students – a warm and trusting relationship – necessary for the success of the product? Must the teacher have any special sort of training (beyond the usual teacher education and subject-matter competence) to use the product? Is training in values education required?

Grouping: Options are large group, small group, or individual use of the product, or a combination of those situations.

Initiator: Who makes the decisions as to what learners will do when, the teacher or the learner? Is the progress perhaps more or less dictated by the product itself, or are the choices quite free?

Interactions: Are there interchanges between learners and teacher, and among learners? Are there several modes or transaction: verbal exchange, observation, manipulation, reading, listening, writing, and so on?

Time and Pacing: Is the product designed for use in a fixed period of time (ten one-week units, a one-semester course) or as the curriculum demands? Do all learners go through the material at the same pace, or does the pace vary with individual interests and abilities?

Fifth Column: Means of Evaluation (the fourth construct)

Purpose: When entry points are variable, scope flexible, routes multiple, a measure for *placement* of learners in the proper spot is needed. Internal *progress* measures can indicate whether mastery of a segment of instruction has been achieved, thus directing failing learners to repeat or to go to new material dealing with the same segment if available, and sending learners who succeed to the next segment, whether in a fixed sequence or in a situation of choice. *Mastery* measures indicate the degree to which learners achieve the criteria for the whole unit of

instruction, or how their performance compares with that of their peers who have undergone the same measuring procedure.

Reference: Performance can be compared with a *norm:* the performance on the same measure of a representative group of the learner's peers, say a nationwide sample of students at the same grade level in similar (public, private, parochial) schools. Or it can be compared against a *criterion:* a preset standard of mastery of competence, say naming 95 per cent of capitals of the 50 U.S. states correctly.

User: As in other decisions about instruction, sometimes the *teacher* uses the results of measurement to place, counsel, guide, reroute learners, and sometimes *learners* evaluate themselves and make decisions as to their next steps.

Description: Does the producer provide measures or recommend them? What procedures are included for review before assessment takes place? Are the measures objective or open-ended? What types of learning or behavior do they measure?

Sixth Column: Other Considerations and Comments

Characteristics and Quality of Product: What do the books look like? Are the films in color? How well are the components designed, produced, packaged, labeled? Will they (in the analysts' opinion) appeal to users aesthetically? How well will they stand up to usage?

Special Points: Will the school be well advised to take steps to introduce this product to the community at large before starting to use it either because of sensitive subject matter or an innovative approach to classroom organization? Are there some communities where its use should be avoided altogether? (An example: by law, teachers in Pennsylvania may not present any material which so much as mentions the theory of evolution to Amish students.) Does the product make unusual demands of time or skill on a busy teacher? Are there out-of-classroom-time preparations, for instance, which would be onerous?

Quotes from EPIE Analysts: are just that, summary comments, recommendations, and reservations.

GLOSSARY OF TERMS

Users of this *EPIE Report* will profit more from it if they keep in mind these definitions, referring to this section when the meaning assigned to a term is not clear.

Teaching *for* or *about* Values and Valuing

Teaching *for* values means teaching students to adopt certain values: "Do not take what does not belong to you, regardless of how easy it might be or how little it is valued by its owner." Teaching *about* values means explaining what value judgments entered into reported decisions: "I cannot tell a lie; I did it with my little hatchet." Teaching valuing skills means teaching students to identify and clarify their own values, to identify others' values, to develop empathy, to learn to analyze value issues and conflicts, to explore hypothetical value dilemmas. Developers may attempt to teach any or all three aspects quite explicitly, or teaching may be implicit in the content and organization of the product.

Approaches to Values

Evocation: To help students exude or evince their values (moral emotions) spontaneously without thought (gut level reactions)

Inculcation: To instill or internalize certain values in students; to change the values of students so they more nearly reflect certain desired values

Awareness: To help students become aware of and identify their own values and those of others; to encourage students to share, not argue or debate, their value positions with each other

Moral Reasoning: To help students develop more complex moral reasoning patterns; to urge students to discuss the reasons for their value choices and positions, not merely to share with others but to foster change in the stages of reasoning of students

Analysis: To help students use logical thinking and scientific investigation to decide value issues and questions; to help students use rational, analytical processes in interrelating and conceptualizing their values

Clarification: To help students use both rational thinking and emotional awareness to examine their personal values and behavior patterns; to help students communicate openly and honestly with others about their values; to encourage students to change their intellectual value structure to reflect their "real" values; to encourage students to act on their value choices

Commitment: Those purposes listed for "analysis" and "clarification"; to provide students with opportunities for personal and social action based on their values; to encourage students to view themselves as personal-social interactive beings, not fully autonomous, but members of a community or social system

Sheet 5

Addison-Wesley: AMHERST PROJECT UNITS IN AMERICAN HISTORY

Identification and Background	Intents
TITLE: Amherst Project Units in American History **PUBLISHER:** Addison-Wesley Publishing Company, Inc. Sand Hill Road Menlo Park, CA 94025 (415) 854-0300 **AUTHORS:** Richard H. Brown and Van R. Halsey, project directors. Each unit written by a teacher in consultation with editor. (Project USOE-funded) **COPYRIGHT DATE:** 6 units, 1970; 4 units, 1972 (also available, but not included in the analysis: 3 units, 1973; 1 unit, 1974). **MEDIUM:** Print. **COMPONENTS AND PRICE:** Each unit, $1.50 per text, $.60 per teacher's manual. Also included: "A Guide to the Amherst Approach to Inquiry Learning." **RESEARCH AND DEVELOPMENT EVIDENCE:** Some 600 teachers from a wide range of school types and school populations kept daily logs and collected audio and visual feedbacks. These, plus student papers and critiques, formed data for revision before publication. **TARGET POPULATION:** Junior high school to junior college. **CURRICULUM ROLE:** A complete inquiry course, or augmentation for any U.S. history text. 65	**DEVELOPER'S RATIONALE:** To supply material which will facilitate individualized open-ended learning about history, to assist in clarifying the demands of citizenship. These materials teach explicitly *for* such values as open inquiry, and confrontation with dilemma; and explicitly *about* such values as freedom and authority, imperialism and the dilemma of power, and the ethics of war. In addition, they stress the acquiring of "valuing" skills and, implicitly, they teach – at least to some extent – that all decisions should be based on careful research of primary documents. The emphasis is that of analyzing and clarifying one's own values, leading to moral reasoning and commitment. **LEARNER GOALS:** "Each unit is structured for the pursuit of some genuinely open-ended universal question of human behavior which the student is invited to help frame at the outset....A primary goal of every unit is that students should constantly be able to recognize and define themselves in regard to this conflict and that through it they should be constantly reflecting on their own values...[at the same time] developing and practicing scholarly skills." **LEARNER OBJECTIVES:** With *promotional* materials there is an "Educational Objectives Chart" in which objectives, presented in terms of basic questions and a content summary for each unit, are categorized as cognitive or affective according to Bloom and Krathwohl taxonomies. Then, each teacher's manual lists outcomes for the unit in question. For instance, in the manual for "What Happened on Lexington Green?" these questions occur, with indications of what processes the student will go through in finding answers: "How Do We Know the Truth about Past Events? What Is History and What Do Historians Do? What Is Reality and How Does One Apprehend It?" The student reconstructs events, analyzes and evaluates evidence, compares and contrasts various modes of inquiry, and uses evidence to refine one's own thoughts about how people know. **CONGRUENCE:** The inquiry-related goals permit adaptation of objectives for individuals or for differing situations.

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Contents

SCOPE: The Project consists of a well constructed, open-ended series of modular units which cover in detail real historical topics, events, episodes, and people. The student reconstructs the subject matter from evidence, i.e., from primary documents supplied. Those documents vary in readability and length from unit to unit; there is some suggestion as to supplementing the content with related material; a bibliography for teachers and students is included. The units stand alone; a teacher may decide to use all or some of them, for all or some of the students in a class. Units are as follows (listed in order of copyright date): 1. Freedom and Authority in Puritan New England; 2. What Happened on Lexington Green? An Inquiry into the Nature and Methods of History; 3. Collective Security in the 1930s: The Failure of Men or the Failure of a Principle?; 4. Communism in America: Liberty and Security in Conflict; 5. Hiroshima: A Study in Science, Politics, and the Ethics of War; 6. Korea and the Limits of Limited War; 7. Thomas Jefferson and the Embargo, the Decision for Peace; 8. Lincoln and Slavery: Ideals and Politics of Change; 9. The Right of Americans: The Changing Balance of Liberty, Law, and Order; 10. God and Government: The Uneasy Separation of Church and State.

SEQUENCE: The developer recommends a sequence within each unit, but overall sequence is left to the teacher, who may use the units chronologically, or may adopt an analysis or a synthesis approach. There is a considerable flexibility in entry, progression, and route, depending on how the materials are used.

ACCURACY: Analysts state that material is accurate in every respect, consisting as it does of a variety of primary sources.

FAIRNESS: There is attendance to balance throughout. Bias seems to be carefully avoided, e.g., units which deal with potential racial prejudice are balanced through a choice of primary materials. No value judgments are made; people are not described physically; occupations are mentioned, but no comments made. Analysts note teacher's manual has evident U.S. bias, but attempts are made to counteract it.

VALUES AND VALUING: Although values and valuing are not defined, they are described. Several value systems are represented, but the analysts point out the nature of the material is such that the primary sources represent many points of view. Editors do not make explicit statements of judgments. Value orientation can be inferred only through selection of content. The materials primarily reflect a behavioral science value system, dealing with moral or religious and political values, and to some extent with scholarly ones.

CONGRUENCE: Content is well organized; the material is carefully prepared and edited. Only liability is invariant format, which might become boring if units are taught successively.

Methodology

PRESENTATION AND DESCRIPTION: "A Guide to the Amherst Approach to Inquiry Learning" discusses the inquiry design as it relates to this product and also to the teaching of these units. The teacher's manuals are clear and comprehensive. It is obvious that suggestions have been developed as a result of field studies. Discussion questions, including an "open-ended universal question" to which the others relate, are suggested for each unit. There are occasional suggestions for dramatizing readings and sparking up the repetitious format.

LEARNING ENVIRONMENT: The material could be used in an open or a structured manner. Guidelines to help the teacher build an open atmosphere are provided, and such an atmosphere would enhance the effectiveness of the material. The publisher recommends specific value training for the teacher, and provides some help in the teacher's manual and the "A Guide to the Amherst Approach." No other special training in the method would be necessary. Teachers should have some background in use of primary sources, inquiry, and discussion techniques.

GROUPING: Open to interests and abilities of students as well as teachers' use; very flexible.

INITIATOR: Material requires active participation by the students. Although most responsibility rests with the teacher, objectives could be suggested by students depending upon their abilities and interests.

INTERACTIONS: Choice of activities could be different for different students; there is considerable choice, but extracting the most value from this method depends upon a strong teacher.

TIME: Time is open to variation.

PACING: Pacing may be determined by the teacher, or by students through selection of objectives.

CONGRUENCE: "The best 'fit' is to open, inquiry-process teachers, but traditional teachers would find materials appropriate as well." The methodology would be more successful if students "had some prior knowledge about learning skills, especially in separating fact and opinion [and] objectivity [versus] subjectivity."

Means of Evaluation	Other Considerations and Comments
CONGRUENCE: The "Amherst Approach" guide discusses evaluation fully, particularly essay testing; some very general suggestions for essay questions appear in all units.	**CHARACTERISTICS AND QUALITY OF PRODUCT:** Each Project is packaged separately, with paperbound text (also available in looseleaf form) and a teacher's manual. "A Guide to the Amherst Approach to Inquiry Learning" evidently accompanies each shipment. Each unit can be bought as a "Sampler," containing the text, the teacher's manual, a sequence chart, a taxonomy chart, and the inquiry method booklet. The quality is good, except that print is unrelieved; there are no photographs, and there is only limited use of graphics. **SPECIAL POINTS:** "The units would have to be limited and adapted by the teacher for students of poor reading ability." **Quotes from EPIE Analysts** • "They [the units] allow students to deal with historical data, to practice skills of hypothesizing, analyzing, synthesizing, and evaluating....The concepts are universal. Highly recommended."

Ginn and Company: EPISODES IN AMERICAN HISTORY: AN INQUIRY APPROACH

Identification and Background	Intents
TITLE: Episodes in American History: An Inquiry Approach **PUBLISHER:** Ginn and Company 191 Spring Street Lexington, MA 02173 (617) 861-1670 **AUTHORS:** R.E. Burns, senior author; L.R. Boyer, J.R. Felton, P. Gleason, J.J. Lyon, J.E. O'Neill, and C.J. Tull **COPYRIGHT DATE:** 1973 **MEDIA:** Print and audiovisual (optional). **COMPONENTS AND PRICE:** Textbook (hardbound): $6.87; teacher's guide: $6.33; tests (64 spirit masters): $19.08 (not available to analysts). Optional audiovisual kit (four filmstrips, 48 transparencies, one record): $69.00; separately: filmstrips: $22.89; transparencies: $41.01; record: $7.38 (not available to analysts). **RESEARCH AND DEVELOPMENT EVIDENCE:** Producer reports prepublication field testing in the South and the Midwest, in suburban and rural grades 8-12, at various ability levels. Use of data, gathered by means of tests, is not described. **TARGET POPULATION:** Grades 10-12; designed for students in grade 11, but feedback indicates it can be used by students who read at grade-10 level. **CURRICULUM ROLE:** A two-semester course in American history from prehistory to 1971.	**DEVELOPER'S RATIONALE:** To facilitate the acquisition of a knowledge of history through the inquiry method; to teach history as a means of "knowing ourselves," on the basis that the tasks and skills of historical inquiry can readily be transferred to other intellectual and social applications. The materials are not designed specifically to teach *for* or *about* values, though the goals and objectives point to the teaching of valuing by fostering "awareness" and "analysis." **LEARNER GOALS:** The program seeks to improve the ability to think independently, to make judgments based on evaluation, to ask probing questions, and to make inferences. It also seeks to teach the history of *all* the American people. **LEARNER OBJECTIVES:** Each assignment specifies what tasks and skills are required to complete it. Performance objectives appear in the text as well as in the teacher's guide. Some objectives for Chapter 1, "Slavery as an American Institution," of Unit VII, "Civil War and Reconstruction": Content Objectives – to know that slavery is an institution with a long pedigree...to know that in the Dred Scott case, the Supreme Court decided Congress could not exclude slavery from the territories... Performance Objectives – to be able to analyze a given selection from English records and commentaries on the legal status of slaves in eighteenth-century England for meaning...to be able to compare the legal status of slaves in eighteenth-century England with that of early nineteenth-century America and make a hypothesis explaining the difference. **CONGRUENCE:** Goals and objectives are well defined and congruent with one another, and suitable for the target population.

Contents	Methodology
SCOPE: Broad, detailed coverage, with a multiple choice of media to enlarge and expand the direction set by the text. The material is divided into four major parts: "Early Americans"; "From Revolution to Reform"; "Division, Unity, and Expansion"; and "Twentieth Century Americans." An extensive amount of related material is suggested throughout, but not directly specified; they are principally selections from primary sources, interpretations by current historians, charts, photographs, all clearly consonant with producer's goal of teaching students to think independently and use the inquiry method. **SEQUENCE:** The sequence suggested by the author is based on a chronological ordering of the material as well as on the building of concepts, one upon another. "The sequential questions and anticipated responses provided for each assignment are the heart and soul of the program. They are the means by which the content and performance objectives are reached." **ACCURACY:** Analysts note that content was chosen to raise questions in the minds of the readers and to open up discussion about controversial aspects of our nation's past. **FAIRNESS:** Analysts advise that authors have conscientiously designed material to avoid stereotypes and racial bias. **VALUES AND VALUING:** The content of the materials deals primarily with scholarly values, somewhat with social and political values, emphasizing, identifying the values of others, developing empathy, assessing the truth and relevance of facts in order to arrive at a tentative value decision, and hypothesizing about one's own choice in a specific situation. **CONGRUENCE:** "Not only are the materials well organized [around the inquiry method], but the rationale is well explained in the beginning of the Teacher's Manual." The analysts feel that many of the units require a good deal of social studies maturity on the part of the students, and have some feeling that the single-path approach is a little constricting.	**PRESENTATION AND DESCRIPTION:** There is a detailed teacher's guide, prepared for teachers who may be inexperienced in the directed discussion-inquiry mode of instruction. Questions which the students generate plus analytical questions suggested in the teacher's guide, provide the basic ingredients for directed discussions. Student reading assignments contain questions to help them organize their thinking so they may arrive at tentative hypotheses. The guide suggests at least basic questions and gives possible student responses. It also provides some guidelines for the teacher's role, e.g., the teacher must not dominate class discussion, but must be sufficiently insistent to avoid premature closure of discussion. **LEARNING ENVIRONMENT:** The environment is quite structured, but an atmosphere of rapport would enhance the effectiveness of the material. **GROUPING:** Because the method requires the assistance of a leader or moderator, the material should be used in small or large groups. A small group would be more effective, if time and space permit. **INITIATOR:** The material; all the units are organized around content objectives and performance objectives chosen to implement the major goals of the program and, as a result, the most benefit would come from following the suggested structure closely. The plan requires active student participation. **INTERACTIONS:** Extremely varied. **TIME:** Use as a one-semester or two-semester course allows for no variation or flexibility in the time, but the units may be used individually or as supplements to other material. **CONGRUENCE:** The analysts feel that this material will, "...appeal to teachers who have become disenchanted with coverage as an instructional objective and who are dissatisfied with the lecture as the principal mode of teaching American history."

Means of Evaluation	Other Considerations and Comments
CONGRUENCE: Tests which the producer makes available for use with the program were not available to the analysts.	**CHARACTERISTICS AND QUALITY OF PRODUCT:** Hardbound text has 686 pages. Content also available in four separate paperbacks. The teacher's guide has 287 pages; it is paperbound. The technical quality of the textbook and of audiovisual materials (listed in Price section) is good; the text is clear and well edited, and quite well written. **SPECIAL POINTS:** Analysts feel that discussions with the community might be helpful because some communities might say "the facts are left out." **Quotes from EPIE Analysts** • "Excellent – but too single-minded in its orientation to be the sole approach." • "Teachers who are not experienced in inquiry have excellent guidance... Teachers comfortable with traditionally conceived and organized courses will encounter ideas and approaches that are unfamiliar to them." • "Materials and methods are excellent. Since each unit, however, has essentially the same format, I think teachers should intersperse other materials and methods."

Part II. COMPARATIVE SURVEYS OF PRODUCT-SELECTION CRITERIA: 1969 and 1976

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Part II. COMPARATIVE SURVEYS OF PRODUCT-SELECTION CRITERIA: 1969 and 1976

A. Overall View of the Materials Selection Criteria Used in 1969

How do state and local education agencies choose instructional materials? In 1969, EPIE Institute sought to answer this question by surveying state and local education agencies. Each of the agencies contacted was asked to submit any evaluation forms used in the selection process. Although EPIE received 165 reports, only 30 of the selection agencies submitted criterion checklists or materials evaluation forms. Many selection agencies reported that they did not use formal statements of evaluation criteria, but rather relied on informal criteria developed by subject-matter experts. Other agencies simply used prescribed courses of study as guides.

The criterion checklists, as well as other information submitted by selection agencies, were incorporated by EPIE into a report, Evaluation Practices Used in the Selection of Educational Materials and Equipment (copyright, 1969, EPIE Institute). The report is a case-history description of how a sampling of state and local education agencies choose instructional materials. The bulk of the report focuses on the actual mechanics of the selection process (choosing committees, obtaining materials for review, setting up evaluation schedules, and preparing lists of acceptable materials). However, the checklists used to set criteria were summarized where appropriate, within the specific case studies. The following are examples of some selection criteria used in 1969 which pay notable attention to special educational objectives, treatment of minorities, or elicitation of student reactions.

- Members of the state education authority staff review all recommended books for the Commissioner of Education, to see if they are suitable, present factual information, and adhere to American ideals.

- Detailed guidelines were developed for use in evaluating textbooks on their treatment of minorities. The guidelines covered four major areas: historical accuracy, realistic treatment of the history of minorities, the concept of race, and the total effect of the textbook's treatment of minorities.

- The Department of Intergroup Relations of the Division of School-Community Relations made careful analyses of the listed books in terms of 20 criteria developed by the Department. The criteria require positive (rather than mere absence of negative) treatment of minority groups.

- Specialists in mathematics education developed a Content Authority List of more than 300 content items, classified under seven general mathematics topics. A Behavior Authority List was developed based on mathematics curriculum research at a state university. This list consisted of 1500 pupil objectives and was logically related to the Content Authority Lists; it concerned 11 mathematics topics in five major levels of skill-activity difficulty. Codes, based on these lists, are assigned to every mathematics program analyzed.

- The State Textbook Committee evaluated programs in light of criteria set by the Course of Study Committee. These criteria included consideration of: required basic content; educational objectives of the course; changing scientific, technological, and cultural developments; established facts of American history, tradition, and patriotism.

- Criteria for evaluating film loops include: estimates of appropriateness, effect, and quality of the materials; their usefulness (particularly as compared with filmstrips) in the curriculum; teacher observations (on a rating scale) of student acceptance of loops; and rating scales giving student reactions to the loops.

Most of the checklists studied lack the elements summarized above. The following general conclusions summarize EPIE's findings about the majority of evaluation criteria in use in 1969.

In all cases, it was implied that purchase decisions rest on results obtained from completed forms, and, in some cases, it was stated that the forms are filed and available to those interested in the materials evaluations contained therein. Yet no manuals or instructional programs were provided for the completion of the forms and, in most cases, there were no provisions made for the following activities:

- monitoring evaluations;
- synthesizing and summarizing responses;
- interpreting, using, or disseminating results.

Most forms aim at eliciting objective information about the material, with little attention to the user's subjective judgments. Of the few forms which did assign "ratings" to various items (in an attempt to channel subjective judgments), most give no information on how the weights were assigned. Or, the forms use a numerical

rating scale, and assign a simple total as "score" for each book considered. This score gave equal weight to such diverse elements as quality of typography and adequate coverage of the subject matter.

In the few cases where forms supplement rating scales or checklists with requests for comments, the questions eliciting such comments are usually too vague or broad or both, thus open to many different interpretations.

Forms rarely provide opportunity to indicate the material's suitability for various groups of learners. When evidence of suitability was sought, the usual distinction made is whether the materials are suitable for students with above-average, average, or below-average reading levels. Most forms give no attention at all to materials' suitability for students of diverse ethnic or socioeconomic groups, or to interests of various students.

No mention is made of the amount of teacher training and experience required to use the material successfully.

The teacher was the overwhelming respondent to the forms; only one agency called for students' judgments about the materials, and none asked for ratings from parents or administrators.

B. Comparison of Criteria: 1969 and 1976

In 1976, EPIE decided to survey the original 1969 respondents to determine what, if any, changes had been made in the selection criteria used. This survey of 30 state, intermediate, and local education agencies is, of course, a sampling of selection agencies. No other agencies were surveyed because of the anticipated difficulty of obtaining 1969 forms for comparison. The value of this sampling lies in the

historical comparison it makes possible.

In 1976, four selection agencies were using the same criteria for evaluating materials as were used in 1969. These four are:

- Office of Education, County of Santa Cruz, CA
- Office of Education, Los Angeles County, CA
- Programmed Learning Advisory Service Division, Randolph Air Force Base, TX
- Visual Aids Department, Toledo Board of Education, Toledo, OH

Two evaluation projects that were active in 1969 are no longer in existence:

- The New York State Media Evaluation Program (AIM) was discontinued for lack of funds.

- The Buck's County, PA, Filmstrip Review (produced by school librarians) was discontinued because "there are more filmstrips reviewed in Booklist, and the magazine, Previews, now exists."

Two selection agencies which informed EPIE that they use revised materials evaluations forms did not submit the new forms in time to be included in this report. These are:

- Pasadena City Schools, CA
- Patterson Media Center, NJ

The following is a list, arranged alphabetically by state, of the selection agencies which have revised materials evaluation forms used in 1969. Some of the revisions are negligible; others are extensive, as can be seen from the analyses that follow.

- Alabama
  - State of Alabama
- Arizona
  - State of Arizona
  - Phoenix Union High School System
- California
  - State of California
  - Bay Area Media Evaluation Guild
- Connecticut
  - Greenwich School District
  - Hartford Learning Resources Center
  - METRO (CREC)
- Delaware
  - State of Delaware
  - Newark School District
- Georgia
  - State of Georgia
  - State Film Libraries

- Michigan
  - State of Michigan
  - Detroit Public Schools
- New York
  - New York City Public Schools
- North Carolina
  - Mount Airy City Schools
- Oklahoma
  - State of Oklahoma
- Pennsylvania
  - Pittsburgh Public Schools
- Texas
  - State of Texas
  - Houston Independent School District
  - Education Service Center, Region I
- Virginia
  - Arlington County Public Schools
- Washington
  - Seattle Public Schools

1. Comparison of Criteria Used by State Education Agencies

At first glance, a comparison of the criteria used by states to choose instructional materials in 1969 with those used in 1976 reveals no common trends. In 1969, three states in the sample -- Alabama, Georgia, and Oklahoma -- used sets of minimal criteria, concerned primarily with authors' credentials; the accuracy, suitability, and patriotic values of the content; and the physical quality of materials. In 1976, these three states had virtually the same sets of criteria. Yet, the State Film Libraries of Georgia and the states of Arizona and California, which all used minimal criteria in 1969, had much more detailed and complex lists in 1976. By contrast, in 1976 Michigan revised and abridged the detailed criteria used in 1969. Finally, the states of Delaware and Texas, which used complex criteria in 1969, by 1976 had expanded these still further to reflect current concerns.

A closer look at these disparate criteria lists does reveal some common elements. When analyzed according to the EPIE criteria model (discussed in detail in Part I), the following patterns emerge:

(1) most states evinced little or no concern with the Intents of the product, i.e., the developer's rationale and the goals and objectives set for users;

(2) most states were extremely concerned with the Contents of the material, especially in terms of accuracy and fairness;

(3) there was some concern for Methodology, especially whether materials can be used in a variety of ways and whether teacher aids are provided;

(4) most criteria lists barely touched on Evaluation;

(5) one of the areas of major concern was Additional Considerations, especially the quality and durability of materials and community acceptance.

The above conclusions can be verified by a close examination of the criteria summaries in the following section. Few lists of criteria alluded to the goals and objectives which the materials set for learners. In fact, only two 1969 state criteria mentioned this element of instructional design. Delaware required that "A textbook should both support and complement the basic educational objectives within a specific subject area...." Texas alone had detailed statements of goals for each subject area under adoption. By 1976, both California and Arizona showed some concern for analyzing the goals and objectives of materials. For example, one of the many criteria for reading materials in California is that "Material is designed to develop critical reading and thinking skills." Materials chosen for language arts in Arizona must "ensure an ability to read, understand and appreciate the important ideas and achievement of man's past and present ...." Thus, only four states in the sample give attention to the Intents of the programs selected.

All the state criteria for both 1969 and 1976 give the greatest attention to Contents. This element of instructional design includes the scope and sequence of the content; its accuracy, currency, and fairness; and its suitability for learners. Most of the points covered on the criteria lists used by Alabama and Oklahoma are related to content. Alabama, for example, requires "Clarity of concepts, suitable vocabulary, accuracy of information, reference features, clarity of pupil aids and study helps,

interesting subject matter, and freedom from partisanship," thus devoting seven of its 14 criteria to issues of contents.

One of the major concerns, both in 1969 and 1976 criteria, is that contents be suitable for the age and interest levels of learners. Georgia, for example, with only five major criteria, asks, "Is the subject matter meaningful in terms of pupil needs, experiences, interests, and understandings, for the age and grade level intended?"

All states specify that contents must be accurate. This specification is often coupled with a requirement that the authors' credentials be reliable. And, content should "meet the basic philosophy of American democratic society" (Delaware). State after state expressed concern that the values of American society be an integral part of the content. In fact, this concern was more prominent in 1976 than in 1969.

In 1969, most states simply prescribed that a product should, in general, reflect American ideals. By 1976 a number of states had detailed requirements reflecting local standards. The only specific changes made in the Oklahoma criteria were two questions prohibiting language "repulsive to morality or virtue," and material "treated obscenely or felt to be morally wrong." The policy guiding materials selection in Arizona in 1976 declared that "coarse, vulgar, profane expressions or terms shall be avoided in all textbook content." The 1976 California criteria contained a section on the use of "dangerous substances," prescribing that "the use of tobacco, alcohol, narcotics, or restricted dangerous drugs is not glamorized or encouraged...." In 1976, Michigan social studies texts were to "convey to the students written values basic to the American system ...." A 1975 Texas law required that "Evolution should be identified as theory, not fact ..." In sum, by 1976, there was an overriding concern that the contents of materials reflect the local community's perception of basic American values, and most especially, that materials not include

language or ideas which the community found threatening to those values.

On a more positive note, many communities have come to perceive social fairness to be a basic American value. This was an encouraging, though uneven, trend observed in the criteria changes. In 1969, only Texas and Michigan addressed the issue of fairness in portraying racial and ethnic minorities (although Oklahoma did have a requirement that "fairness to all groups be the keynote in discussion of racial, religious, and ethnic groups"). By 1976, California and Delaware had a detailed set of criteria dealing with fair treatment of racial and ethnic minorities, Arizona had a number of points relating to these issues, and the Georgia Film Libraries required that material be "nonracist and nonsexist." The above states, with the exception of Oklahoma, also prescribed that the role of women in society be presented in a non-stereotyped manner.

Methodology, the third EPIE design construct, was covered somewhat by the 1969 criteria. The most general concern was that teaching aids and manuals be adequate. Oklahoma did require that materials be suitable for multilevel learning and Texas required that materials be usable for self-study. By 1976, some emphasis had shifted to prescribing that materials provide flexibility in teaching and learning styles. California criteria, for example, had sections on "provisions for individual differences," and on "quality of teacher materials." One notable trend reported in the 1976 Survey is that California, Arizona, and Texas have prescribed that materials should meet the needs of bilingual students.

Evaluation, the fourth EPIE design construct, was virtually ignored in the criteria lists. In 1969, only two state criteria alluded to it. Oklahoma required "appropriate testing and/or evaluating materials," and Alabama required "Provision for adequate self-evaluation." By 1976, only California, among the sample, had added a criteria

section dealing with evaluation.

In sum, state criteria for instructional materials give major attention to contents, only one of the four elements of instructional design in the EPIE model. The major changes since 1969 are more detailed requirements that contents reflect patriotic and moral standards of the community and that materials provide a balanced view of all segments of society.

Additional Considerations, the final section of the EPIE analytic criteria model, deals with physical description, technical quality and cost of materials, product research and development evidence, teacher training and preparation, and community acceptance. Of the above areas, questions of technical quality and cost are of major importance in most state criteria. Requirements for teacher training and preparation were barely touched on, both in 1969 and in 1976. And, almost no attention was given to product research and development evidence.

In 1969, not one state required such evidence, except for stipulations that the authors' credentials be "authoritative." By 1976, California had yet to implement a state law mandating learner verification and revision evidence (although LVR evidence was alluded to in a section on "additional data" for evaluating materials). Texas, alone of the eight states surveyed, had the following requirement: "In the developmental stage of each textbook, authors should have field tested the material with teachers and students. Written evidence from such testing, showing how the publisher (authors) used the results of the field trial or pilot test in completing the book should be made available to the State Textbook Committee."

The final category in Additional Considerations is that of "community acceptance." Community acceptance -- or rejection -- of materials was of some concern to selection

agencies in 1969 as evidenced by the requirements for contents reflecting American values. The concern had grown by 1976. It is noteworthy that the only changes made by the states of Oklahoma and Alabama in their selection criteria relate to controversial materials. In the case of Oklahoma, the only two additions regulated the language and morality of materials. In the case of Alabama, the change was the deletion of requirements to consider possibly controversial public and social issues.

By 1976, the states of California and Arizona had joined the state of Texas (alone in 1969) in providing for some kind of preadoption inspection of, and commentary on, materials by the general public, and specifically by parents. Other selection agencies, such as Delaware, had tightened and further detailed procedures for selecting controversial materials.

The data in the following section illustrate in detail the trends cited above. Each set of criteria used in 1969 is summarized, with examples of major points. Each 1969 criteria is then compared with that used in 1976. Where relevant, changes, additions, and deletions are keyed to the 1969 data.

State of Alabama

In 1969, Alabama, an adoption state, used a number of evaluation forms. A basic "Textbook Appraisal Form," for use by evaluators who wished a general set of criteria, required ratings of good, average, or poor for 14 general criteria. The first was:

> "Meets requirements of the Course of Study for grade and subject... according to general objectives of education in Alabama."

Other areas mentioned were:

- suitable vocabulary and sentence structure;
- interesting subject matter;
- clarity of concepts underlying subject matter;
- provision for adequate self-evaluation;

- reference features;
- teaching helps;
- variety and clarity of pupil aids and study helps;
- accuracy of information;
- physical features of book;
- qualifications of authors; and
- freedom from partisanism.

Evaluators were also asked to rank the textbook with others in the same field.

Textbook appraisal forms for specific subjects were also available. These were prepared by specialists in the state department of education, in consultation with members of course of study committees. The forms varied slightly in wording and emphasis, but all asked for a rating for topics under the following headings:

(1) physical features;
(2) author, purposes, style;
(3) organization of content;
(4) nature of content; and
(5) teaching and learning aids.

In 1976, the basic "Textbook Appraisal Form" is unchanged and still in use. The subject matter forms are virtually identical with those used in 1969, although there have been some design changes in the forms themselves. One form, the "Language Evaluation Scorecard" used for language arts, has added a rating space for "overall evaluation" of each area covered (content, author, etc.). The most notable change in the forms received is the omission of the following items from the "Nature of Content" section of the 1976 social studies textbook appraisal form:

D. Treatment of historical or contemporary controversial issues: COMMENT on objectivity of presentation (consideration of conflicting views, values, attitudes, and course of action)
   1. National-State government relations
   2. Racial and ethnic groups (including pictorial illustrations)
   3. Civil Rights movement (aims, activities, civil disobedience)
   4. Treatment of United Nations
   5. Treatment of Communism
   6. Vietnam War and other aspects of foreign policy including foreign aid
   7. Political leaders
   8. Role of special interest groups

G. Select two or more topics for analysis -- compare and contrast presentation with other texts -- COMMENT

State of Arizona

In 1969, Arizona, an adoption state for grades one through eight, had a State Textbook Evaluation Committee. One of its duties was to develop "evaluative criteria" which were to be used as guidelines for all members evaluating textbooks and other instructional materials adopted in that particular year. The specific criteria for 1969 were not available to EPIE; however, the committee was instructed to give each program a relative ranking on a standard rating form.

By 1976, Arizona had a State Board of Education Policy defining textbook contents. The policy, quoted below, is to serve as the basic criterion for textbooks adopted in Arizona.

> "Textbook content shall not interfere with the school's legal responsibility to teach citizenship and promote patriotism. Textbooks prescribed by the State Board of Education shall be objective in content; reflect a minimum of bias in interpretations; and shall not reflect adversely upon persons because of their race, color, creed, national origin, ancestry, sex, or occupation. Violence shall be treated in the context of cause and consequence: It shall not appear for reasons of unwholesome excitement or sensationalism. Coarse, vulgar, profane expressions or terms shall be avoided in all textbook content. It should be noted that this applies to textbooks mandated to be chosen by the State Board, and does not apply to library books or any other books chosen by the school districts under their statutory power."

The State Textbook Evaluation Committee was also directed in 1975 to

> "develop standards for evaluation based on inclusion and presentation of the basic minimum content in the Course of Study; and appropriate readability..."

The Courses of Study are quite detailed. For example, the Course of Study for the language arts sets the following minimum requirement:

> "To ensure a knowledge of and a proficiency in successful application of the basic language skills (reading, including phonics, spelling, handwriting, composition, grammar, speaking, listening, and observing) which facilitate learning at higher levels; ensure an ability to read, understand, and appreciate the important ideas and achievements of man's past and present; to enlarge the capacity for self-expression and communication."

A list of 19 "principles" follows the above requirement, e.g.,

> "an ability to listen effectively and to see and hear differences is a valuable asset in learning."

A second list of 26 "facts" includes the following:

> • A composite of selections representative of difference cultural and ethnic groups enriches the students' reading experiences and develops cultural understanding [sic].
>
> • Learning to read in English may be facilitated for students having a primary language other than English by being able to read first in their native language [sic].(Materials for this purpose, not necessarily from the required list of basals, should be provided for students who represent significantly large Arizona linguistic-cultural groups.)

The Course of Study is followed by a 12-page "Publishers Goal Verification Statement" which requires publishers to indicate where each textbook presents specific educational objectives.

The Arizona selection process also provides that parents may inspect materials considered for adoption and testify at hearings held by the state board of education "prior to final adoption of such books." The state board also "highly recommends that district school boards develop procedures:

- for parental review and participation in textbook selection;
- for parents or guardians to view all instructional materials upon request."

State of California

In 1969, California, an adoption state for elementary school materials, had a State Curriculum Commission which appointed selection committees made up of educators from school districts around the state. At least five members of a selection committee reviewed each book in terms of criteria supplied by the Commission. Evaluators filled out a Rating Sheet for Preliminary Evaluation of Textbooks, which asked for a rating of excellent, superior, satisfactory, or unsatisfactory for each of the following:

(1) accuracy:
(2) continuity of learning sequences;
(3) suitability to ability level; and
(4) style of writing.

An overall rating was requested along with a judgment on whether to retain or eliminate the book. Evaluators were also asked to comment on "any particularly noteworthy features such as illustrations, layout, legibility, suitability for particular groups of students, etc.," and to specify grade levels.

After these preliminary ratings were made, a summary rating sheet was submitted for each textbook evaluated. Summaries required only an overall rating (excellent, superior, etc.) for each textbook or series, and a recommendation to eliminate or retain the book. The Commission then used these summary ratings as a guide to its recommendations of textbooks to be adopted.

As of 1976, the California adoption procedures have been thoroughly revamped and expanded. The first step is a "Framework/Criteria" review, undertaken at the beginning of each adoption cycle by each Subject Matter Committee of the Curriculum Development and Supplemental Materials Commission. The committees review the existing curricula framework and criteria for the relevant subject areas "to determine if they remain current, complete, and valid, and, if not, whether they need only minor changes, major changes, or complete revision."

Once the subject matter criteria have been determined, publishers submit materials, after certifying that they comply with California law. These materials are put on public display at centers around the state. Any interested member of the public may inspect materials and may fill in rating and comment forms regarding legal compliance of the materials. These opinions and comments are forwarded to the Legal Compliance Committee which is concurrently screening the materials.

The Legal Compliance Committee -- a racially, ethnically, and geographically balanced group -- screens materials according to a detailed set of six criteria,

mandated by the California Education Code. Three of the six major areas are subdivided into a section giving "essential items" which must be met for compliance and a section of items which should, as a whole, be met, although "100 per cent compliance on each one is not essential to a 'yes' vote." The major criteria are listed below, with samples of both kinds of items included. Starred items are essential. Parenthetical numerals indicate the number of items in each set of criteria. Parenthetical explanations are a part of each criterion point.

I. Male and Female Roles (10)

*2. Instructional materials that generally or incidentally reflect contemporary American society, regardless of the subject area, must contain references to, or illustrations of, males and females approximately evenly, except as limited by accuracy. (This criterion is largely self-explanatory. It applies to those materials in which the gender of persons referred to or illustrated is incidental to the purpose of the material, such as a science or health textbook....)

7. Where life-style choices are discussed, boys and girls should be offered an equally wide range of such aspirations and choices. (Various occupations and various life-styles -- marriage, remaining single, raising children or not doing so -- should also be cast in an affirmative light. A child should not learn that women can, and do, work outside the home, but are unhappy, tired, or too busy to enjoy life if they do so. Fantasies and dreams of children for their own futures should not be sex-stereotyped.)

II. Ethnic and Cultural Groups (10)

*1. References in the form of labels which tend to demean, stereotype, or be patronizing toward minority groups must not appear. (Evaluators should note all references indicating that the talents, activities, or demeanor of racial or ethnic groups are inferior, such as, for example, "savage Indian" or "lazy Mexicans"...)

6. Minority persons should be depicted in the same range of socioeconomic settings as are white persons. (Instructional materials should provide a range of socioeconomic settings with which children can identify, but this criterion does not speak to that need for variety. This criterion directs evaluator to note and ensure that, if a range of socioeconomic settings is portrayed, minority characters participate in the same range of settings as do white characters. Socioeconomic characteristics should not be portrayed as correlated to race or ethnicity.)

III. Entrepreneur and Labor (3)

*1. References or labels which tend to demean, stereotype, or be patronizing toward an occupation, vocation, or livelihood MUST NOT appear.

IV. Ecology and Environment (5)

3. Interdependence of people and their environment is portrayed...

V. Dangerous Substances (2)
2. The use of tobacco, alcohol, narcotics, or restricted dangerous drugs is not glamorized or encouraged by illustrations or discussion references.

VI. Religion
*1. Any reference to a belief which is identified as religious shall be accurate.

Evaluators indicate compliance of materials with the above criteria by a yes/no response on a four-page evaluation form. The form requires page and paragraph references (or frame number, minutes from start, etc., for nonprint materials) and comments for each criterion point.

Those materials which are approved by the Legal Compliance Committee -- an elaborate system being provided for hearings, appeals, and publisher's revisions of those materials found to be in noncompliance by the Committee -- are then reviewed by Instructional Material Evaluation Panels (IMEP) established by the subject matter committees. The IMEPs, composed of educators from across the state, evaluate materials for factual and technical accuracy, educational values, and quality. Panel members fill in a detailed, six-page "Materials Evaluation Form" for each material. Since there are forms for every subject, they vary in specifics, but the overall order is the same.

The forms first ask for an overall recommendation of the material, on a five-point scale from poor to excellent. A "Conclusion Statement" is required in which the evaluator is to identify the major strengths and limitations of the material. Next, evaluators are to identify the following "Descriptors" (from the reading materials form):

A. type of material;
B. type of reading system/program;
C. type of instructional approach;

D. type of learner for which material is designed; and
E. type of inservice training required.

A "Factual Analysis" section directs evaluators to: "Identify by page and line material that is factually inaccurate."

The most detailed section, "Analysis of Materials According to Criteria" asks evaluators to check, on a five-point scale, the extent to which the material meets the specific criteria for the subject matter. These criteria are contained in separate, comprehensive booklets with detailed explanations given for each criterion point. However, the basic points are detailed on the evaluation form. A summary and examples of the criteria section of the reading materials evaluation follow. Parenthetical numerals indicate the number of items in each section.

A. Instructional Program (10)
   4. Material is designed to develop critical reading and thinking skills.
B. Skills Development (8)
   Material provides for sequential skill development of:
   1. Word recognition (sight words, context clues, etc.).
C. Provision for Individual Differences (3)
   1. Material takes into account language differences of students in sound systems, vocabulary, and syntax.
D. Provisions for Evaluation (2)
   2. Test materials are consistent with the objectives of the reading system.
E. Format (3)
F. Teacher Materials (7)
   1. Materials contain clearly stated goals and performance objectives.

Along with the above evaluations submitted by IMEPs, the Subject Matter Committee considers data from other sources before making final recommendations of materials to be adopted. The additional data may be:

- comments from the public as a result of the public display of materials;
- information and opinions from other interested groups or individuals such as teachers, PTAs, religious groups, etc., and
- reports from Department-sanctioned pilot studies or learner verification studies.

Note that, although there is a California law mandating the learner verification and revision of instructional materials, the above is the only reference to learner

verification found in all of the extensive evaluation and compliance forms used by California materials selectors.

State of Delaware

In 1969, Delaware -- a "regulatory," nonadoption state -- used "Criteria for the Selection of Textbooks and Other Instructional Materials." Compliance with these criteria was mandatory for all local districts. The prescribed criteria consisted of three sections: "Specific Criteria," "Primary Sources and Controversial Materials," and "For Local Consideration." The "Specific Criteria" were organized into 11 major statements, with the first five statements containing four subsidiary points each. The 11 criteria are quoted below, with examples of the subcriteria.

1. A textbook must meet the basic philosophy of the American democratic society by its:
   b. strong commitment to equal rights and responsibilities for all of its citizens.
2. A textbook must reflect valid scholarship by:
   c. historical soundness
3. A textbook must be consistent with a previously formulated philosophy and with established curricular goals which seek to answer four questions:
   a. What will be taught?
4. A textbook should both support and complement the basic educational objectives within a specific subject area and/or classroom by its:
   a. relevancy to the subject at hand
5. A textbook should include adequate and relevant study aids, such as:
   d. suggestions for fortifying learning: questions, exercises, optional projects.
6. A teacher's manual when one is prepared for a particular textbook should be organized to serve merely as a point of departure or as a teacher's guide, not as a comprehensive instructional program that confines both the teacher and his students within a rigid frame of reference.
7. The contents of the textbook should contribute to the complete development of students by indicating the interrelationships of its particular presentation to all knowledge.
8. A textbook should reflect high quality of typography, illustration, and other aesthetic considerations.
9. Although the chief criteria of a textbook relate to its contents, its approach to the subject, and its objective, the book itself should meet the anticipated requirements of use by its economical and durable construction.
10. A textbook selected must be able to survive comparison with a variety of contemporary text materials and basic resources.
11. A textbook should be selected primarily by the person responsible for presenting it in the classroom, in close conference with those teachers

immediately below and above that academic level, in other courses in any designed sequence of study, and in other courses that form a part of the context or environment of the course at hand.

The section, "Primary Sources and Controversial Materials," was prefaced by the statement that the preceding criteria might, in some cases, be waived when choosing supplementary materials. The rationale was:

> "If a text is well chosen to meet the criteria, then the library may rightfully contain materials of a number of biases; thus allowing the student researcher to become familiar with the attitude of and recommendations from various segments of the literary world.
>
> "Bias is the attitude of one segment of the population toward another group, individual, or idea. One man's guiding philosophy may be another man's bias. Nationalism and patriotism, socialism or capitalism, the Judeo-Christian religious traditions, communism or democracy, are each considered by someone somewhere to be a proper way of life and by someone else to be a bias against him [sic].
>
> "Teachers must carefully review materials to be assigned and exercise the best professional judgment in matching students and materials" [emphasis in the original].

There followed a set of suggested guidelines to be applied to such controversial mateials:

1. Is the author's selection associated with the period for which it is to provide insights?
2. Does the vocabulary suit the age level for which it is intended?
3. Is the content consistent with curricular goals?
4. Is the material reliable? That is, is the translation or copying from the original accurate?
5. Does the material provoke thinking, discussion, and insights on an occurrence or period that would be useful in understanding an event or area being studied, and which would not be as possible using more 'standard' sources?
6. Will the material stimulate reaction so violent as to detract from its value?
7. Are the teachers who wish to introduce the material familiar with the contents and with the possible ramifications of providing such material for classroom consideration? Are the administrators aware of the same and in agreement with the decisions?

A final section of the 1969 Delaware criteria required consideration of local needs in applying or expanding the criteria given above:

For Local District Consideration:

1. Each school district should give consideration to the usefulness of expanding these criteria to meet more specific local needs.

2. In certain school communities it will be prudent and helpful to establish temporary advisory committees to share in the setting of additional local criteria.

3. In the final analysis, it is the classroom teacher who is the unifying element. He [sic] is the one who must apply his [sic] own best judgment to whatever criteria are adopted.

4. The introduction of a textbook should frequently involve at least some inservice training for those teachers directly concerned.

5. It is a good idea to conduct a pilot use of newly recommended material before it is selected for widespread use, particularly where the criteria for controversial material has been applied.

A revised set of criteria, issued in 1973, was in use by 1976. The basic organization remained the same, though items had undergone editorial change, but there were a number of additions and other revisions. Significant changes in the "Specific Criteria" follow:

1. Reworded to "Relates to the basic and identifiable philosophy of our democratic society by its":
   b. "strong" changed to "positive"
   e. addition of: "concerted lack of racial and sexual stereotyping"
2. Addition of "and quality scholarship?"
   c. Addition of "reliability and soundness."
3. All four subcriteria reworded for clarity. For example:
   a. determination of content to be studied -- WHAT
4. a. "at hand" changed to "goals and objectives"
   e. Addition of: "provision for appropriate and optional student learning activities"
   f. Addition of: "appropriateness to both male and female students in non-stereotyped manner."
5. c. Expanded to: "suggestions for reinforcing learning: question simulations, exercises, independent and optional projects and study."
6. Revised to: "Indicates that an accompanying teacher's manual serves as point of departure for that phase of instruction and does not comprise the substance of the total instructional activities."
7. Deleted
10. Changed to: "Represents quality and verifiable content and features when compared with a variety of contemporary materials."
11. Reworded to: "Constitutes selection through a process involving:
    a. persons primarily responsible for use in the classroom; and
    b. persons responsible for articulation of instructional program.

The following new criteria were added:

- Contributes to a better understanding of the subject or area under study.
- Employs the metric system known as the International System of Units (SI) as the standard units of measurement.
- Avoids computational conversions between the U.S. Customary Units System and the International System of Units (SI). The material may provide for informal comparisons of metric units with U.S. Customary Units.

The second section, retitled simply "Controversial Materials," has revised and compressed the rationale quoted above, to:

> "This approach [waiving criteria for supplemental materials] permits the acquisition of references for providing students with opportunities to become familiar with the viewpoints and attitudes from a multitude of sources within the literary world.
>
> "These materials may reflect a number of biases, since the conveyance of a writer's viewpoint may be contrary to the attitude of one segment of society toward another idea, individual, or group. Teachers, therefore, should carefully review all materials directly applicable to the instructional program and exercise the best professional judgment as to selection and utilization by the student."

The following are significant changes in the suggested guidelines for reviewing supplemental materials, as quoted above.

1. Eliminated
6. Eliminated
7. Reworded into the following two requirements:
   - Teachers should be familiar with the contents and possible consequences of classroom use of materials.
   - Teachers should discuss ramifications of controversial materials with immediate supervisor or the responsible administrator for possible agreement and support for usage.

The following requirements were added:

- Materials should stimulate discussion process and interaction within a responsible learning environment.
- Materials should reflect the use of the metric system.... (see "Special Criteria" above).

The section "For Local District Application" had the following significant changes and revisions:

2. Expanded to: "Temporary advisory committees should be established in districts where a representative viewpoint is necessary or additional selection criteria are recommended."

3. Revised to: "Classroom teachers and instructional personnel should be regarded as vital and unifying factors in the selection of all instructional resources."

4. Strengthened to: "Inservice programs and training sessions should be implemented for those teachers directly concerned with the utilization of newly acquired materials."

5. Revised to: "Materials of considerable controversial nature should be introduced on a limited or pilot basis and evaluated before widespread classroom utilization and study."

6. Added: "Representative committees composed of teachers, administrators, students, and interested community persons should be considered for periodical review of controversial instructional materials in order to provide greater understanding and support for objectivity in the instructional programs."

The 1976 Delaware criteria have one major addition, a section titled "Basic Principles for Minimizing Sexual and Other Biases in the Instructional Program." This comprehensive and detailed set of criteria gives eight major directives, including from three to seven subcriteria. The directives are quoted below with samples of the subcriteria. Parenthetical numerals indicate number of items in each section.

- Recognize the multicultural character of our nation, within a framework of unity, as essential to the advancement of a democratic society. (4)

    2. Present diversity of race, custom, culture, belief, and sex as a positive aspect of our nation's heritage.

- Portray the sexual, racial, religious, and ethnic groups in our society in such a way as to build positive images, with mutual understanding and respect. (4)

    3. Convey the identity of minority individuals in illustrations.

- Assist students to appreciate the many important contributions to our democratic civilization made by members of the various groups. (4)

    2. Provide recognition of minority groups and women by showing them frequently in positions of leadership.

- Avoid discrimination by omission or commission, or by overemphasis or underemphasis. (7)

    2. AVOID using "man" as the subject of generalized statements that apply to women as well (original emphasis).

- Clarify the historical forces and conditions which have operated to the disadvantage of minority groups and women. (3)

    1. Expose and discredit "myths" which have misrepresented minority groups and women, or have served to explain inaccurately aspects of social development in the United States.

- Examine the contemporary forces and conditions which operate to the disadvantage of minority groups and women. (6)

    5. Utilize the work of minority and female scholars.

- Analyze intergroup tension and conflict fairly, objectively, and with emphasis upon solving social problems. (6)

    2. Give candid treatment, without attempting to rationalize, destroy, or ignore unresolved intercultural problems in the United States, including those which involve prejudice and possible discrimination.

- Motivate students to examine their attitudes and behaviors and to comprehend their own duties and responsibilities as citizens in a pluralistic democracy. (6)

    1. consistently demonstrate the relevancy between knowledge and issues presented and the life style of the learner.

State of Georgia

In 1969, Georgia, an adoption state, had a list of suggested general criteria for the selection of textbooks in all subjects. The criteria asked from three to seven questions in five major areas. These areas are listed below with sample questions from each. Parenthetical numerals indicate the number of items in each section.

- Authorship (5)
  Does the author's point of view tend to emphasize those desirable social attitudes, understandings, and ideals characteristic of our American way of life?

- Organization (5)
  Does the book lend itself to a variety of methods and teaching techniques? To adjustment of individual needs?

- General Content (7)
  Is the subject matter meaningful in terms of pupil needs, experiences, interests, and understandings for the age and grade level intended?

- Illustrations (3)
  Do the illustrations extend and enrich the content of the verbal text?

- Instructional Aids (3)
  Are sources for additional reading and audiovisual resources suggested?

In addition to these general criteria, specific criteria were to be used to evaluate each material in terms of its subject area. A suggested set of criteria for consumer education, offered here as a sample, listed the following areas to be considered:

- Special nature of the textbook
- Desired approach
- Major emphases to be covered
- Level at which text will be used
- Additional materials

An "Appraisal Form for Textbooks" asked evaluators to give a score and comments for each of the general criteria outlined above. The score assigned possible numerical ratings for each criteria area. Possible ratings were superior, good, average, poor, and unworthy of consideration. A "superior" rating for "authorship" was worth 200 points; one for "content" was worth 400, and so on.

In 1976, the Suggested General Criteria were completely identical with the 1969 version. The "Textbook Appraisal Form" was also identical, with the exception of the rating scale. The following statement had been added:

> "1,000 is the maximum point value for the texts. Minimum score accepted for consideration is 750. 750 indicates an above-average book evaluation."

Georgia Film Libraries

In 1969, the Georgia State Department of Education issued a brief evaluation form to previewers of films to be purchased by the state's film libraries. The form asked for catalog information, grade levels, and a rating (from poor to excellent) of the quality of the photography and sound. A space was provided for a synopsis of the film and for comments. Evaluators were to list the strengths or weaknesses of the film and state the purpose for using it. A "general value of the film"

rating was elicited, and a recommendation for purchase or for refusal was required. Curriculum consultants added their evaluation to the same review sheet, stating their estimate of where the film fit into the Georgia curriculum, their opinion of the appropriate grade levels, and their recommendation for acquisition or refusal.

The 1976 form used for the same purpose in Georgia is entirely different. The form -- it is astonishing to note, adapted from Learning, a commercial magazine -- requires a numerical rating (from unacceptable, 0, to exceptional, 5) for each of the following criteria:

1. quality of information
2. accuracy of information
3. synthesis of medium and subject
4. usefulness of material
5. achievement of purpose
6. motivational value
7. age-level appropriateness
8. evaluator's opinion of the product as a whole
9. evaluator's purchase recommendation

Each of the above criteria is accompanied by a brief exposition of points to consider when rating, e.g., for "accuracy of information":

> "You might consider: current and accurate material; point-of-view -- clear, valid, honest, complete; nonracist; nonsexist; unbiased; appropriateness of visuals and sound/subtitles."

State of Michigan

A 1966 Michigan law, the "Social Studies Textbook Act" requires that: (1) local textbook selection authorities select social studies textbooks which fairly include the achievements and accomplishments of ethnic and racial groups, and (2) the State Superintendent of Public Instruction make an annual random survey of social studies textbooks in use in the state's schools to determine the degree to which these textbooks meet this objective. The product of this first study was the 1968 report, The Treatment of Minorities in American History Textbooks. It included a set of criteria for evaluating social studies textbooks with regard to

their treatment of racial and ethnic minorities. These guidelines include a detailed exposition of the following four points:

1. historical accuracy
2. realistic treatment of the accomplishments and contributions of minorities
3. the concept of "race"
4. the total tone of the textbook

This exposition was summarized in the following list of criteria:

Guideline Summary for American History Textbook Selection

In order to be suitable for use in the schools of Michigan, an American history textbook should:

I. Be historically accurate

   A. The "facts" themselves should be correct.

   B. The facts should be interpreted fairly and in the light of current historical research.

   C. The historical accounts should be presented in keeping with the perceptions, attitudes, and concerns of the times.

II. Present realistically the accomplishments and contributions of minorities in the past and today. Specifically, this means that it should include discussion of:

   A. The backgrounds of minorities in America;

   B. The achievements, accomplishments, and contributions of minorities, with minority persons being clearly identified as such;

   C. The struggle of minorities against opposing forces for freedom, human rights, and equality of opportunity;

   D. Racism in contemporary urban society; and

   E. The significance of social reform for all people.

III. Indicate that its authors have shown great caution in their use of the term "race."

IV. Through its total effect or tone, convey to the student certain values basic to the American system that are both implicitly and explicitly stated.

The report pointed out that these criteria were:

> "relevant to all of the school districts in Michigan, not just to those that have large numbers of minority group students. In fact, youngsters who attend schools that are entirely white and largely middle class are in

> a sense culturally deprived and are very much in need of textbooks and other instructional materials that are reflections of our pluralistic, multiracial, and multiethnic society."

The above criteria were, in truth, guidelines, since in Michigan, local authorities are responsible for textbook selection. However, the law is clear on the requirements, and the report is mandated by law. Thus, the committee which prepared the report urged the State Superintendent of Public Instruction:

> "as a matter of first priority, to ask all Michigan school authorities to evaluate the American history textbooks currently in use in their schools, using the criteria presented in the guidelines developed by our committee. We also believe that these guidelines will give publishers a clear idea of the standards which we in this state expect these textbooks to meet."

A concluding section of the report presents detailed recommendations for the use of the criteria by local agencies, the State Department of Public Instruction, and teacher education agencies.

In the years between 1969 and 1976, four studies were made in compliance with the Michigan social studies textbook law. These studies reviewed elementary school social studies textbooks, including American history books. The 1975 study reviewed civics textbooks. The report, Study of Junior High Civics Textbooks, noted:

> "inasmuch as this marks the first time that the Michigan Department of Education has reviewed civics textbooks, finer pinpoint content comparisons with previous Department reports on American history books might be difficult to make. But specific critiques in this year's report may be compared with previous reports in some areas, particularly in the areas of illustrations, personalities, role descriptions, and ethnic and racial contributions."

The criteria provided for reviewers of civics books included references to the 1966 "Social Studies Act" quoted above, as well as a review of the proposed amendments to the Act. Reviewers were encouraged to use the wording of the amendments as basic criteria. These criteria were summarized in the following questions:

Does the book:

- reflect the multiethnic nature of our society, both past and present?

- reflect the multiracial nature of our society, both past and present?
- reflect the pluralistic nature of our society?
- reflect the multireligious nature of our society, both past and present?
- avoid sex stereotyping?

The above list is the only place where attention is explicitly devoted to criteria for analyzing materials in terms of fairness. In contrast to the detailed exposition, the only other criteria suggested for reviewers are the following list of "Suggested Criteria for Reviewing Civics Textbooks":

1. The structure and operations of federal, state, and various forms of local government should be included in the content.
2. A civics book should encourage a sense of efficacy in the reader. Readers should garner a feeling of being able to do something about government on all levels.
3. The checks and balance system among the various branches of government should be evidenced along with current limitations of this practice.
4. The content of the text should be accurate. The successes and failures of America's governmental institutions and institutional processes should be inherent in the content.
5. The text should be interdisciplinary in its approach. Facts, concepts, and generalizations should be drawn from all of the social sciences.
6. The presentation should be realistic. For example, in a technical sense the presidency of the United States is open to all who qualify by age and residency, but realistically a major portion of the citizens of the United States could not affort to run such a race.
7. The content covered should be adequate. Adequate not only in a factual sense, but also providing opportunities for students to check out local government practices, as well as the background, education, and training of various governmental officials.
8. Through its total effect or tone, the text should convey to the students written values basic to the American system that are both implicitly and explicitly stated.

As can be seen, the above criteria put more emphasis on the actual subject matter of the textbooks, and the effects on student attitudes than do the 1969 criteria. Only numbers 4, 6, and 8 implicitly address the concepts (fair and accurate presentation of society) that were such an urgent concern of the 1969 criteria.

One final note: Textbook selection is still a local responsibility in Michigan, and the criteria developed for the mandatory survey of textbook content are still presented as optional helps to local selection groups. However, the 1976 study did report:

> "The textbook studies have had considerable impact on local Michigan school districts. Continuous feedback from these districts seems to indicate that these reports are viewed as being extremely viable when considering new textbooks. Textbook reports are mailed to all local and intermediate school districts."

State of Oklahoma

In 1969, Oklahoma, an adoption state, had a "Suggested Criteria for Evaluating Textbooks," which asked from one to 12 questions about each of seven areas. The areas are listed below with sample questions given for most. Parenthetical numerals indicate the number of items under each heading.

- Authorship and copyright (7)
  6. If the book is a revised edition, how does it compare in usefulness to the previous edition?
- Content (12)
  4. Can the book be used for multilevel learning in a classroom?
- Format (3)
  2. Is the printed page attractively done?
- Physical Qualities (6)
- Price (1)
- Sensitive Areas (4)
  1. Is fairness to all groups the keynote in discussion of racial, religious, and ethnic groups?
- Teaching Aids (7)
  5. Are appropriate testing and/or evaluating materials available?

In 1976, these criteria were almost identical. One question had been added to the "content" section:

> 13. Is adequate emphasis placed upon inquiry and discovery of cause-effect relationships?

Two new questions were added under the "sensitive areas" section:

> 5. Is the language used in the book repulsive to morality or virtue?
>
> 6. Is the material treated obscenely or felt to be morally wrong?

A final addition is a sample list of "Authorized Kindergarten Material," six items

ranging from transparencies through posters and charts to books. No criteria are given for these items.

State of Texas

In 1969, Texas, a k-12 adoption state, provided members of the State Textbook Committee with the Proclamation of the State Board of Education Advertising for Bids on Textbooks. This proclamation, though submitted to publishers and containing technical and financial requirements, also stated the State Board's policy on textbooks, and outlined a detailed course of study for each curriculum area in which textbooks were being adopted. The course of study -- titled, "Exhibit A: Description of Content of Textbooks" -- constituted the basic criteria against which the textbook committee evaluated the materials considered for adoption. The descriptions of content required for materials were both broad in scope and detailed in specificity. For example, the following is but a sampling of the requirements for arithmetic, Grades 1-3:

- "The textbooks selected shall provide a program which will encourage the child's development of: an awareness of the contributions of mathematics to civilization. . . an ability to discover mathematical relationships, to reason logically, and to think critically . . .
- "The textbook should, by the spiral approach that allows for reinforcement at each stage of development, include these topics: number and numeration... operations and their properties . . .
- "Books should provide: explanations and applications adequate so that the book could be used for self study . . ."
- "The books should be organized so that: pupils may participate actively in discovering ideas through reflective thinking . . . a variety of activities or teaching methods may be used . . ."
- "The textbooks should include or be accompanied by a teacher's manual which provides: background mathematics and techniques for presenting topics of content. . ."

Some areas of note in the 1969 Exhibit A are the following requirements for both supplementary readers, grades 7-8 literature I and II texts. The State Textbook Committee was directed to select textbooks:

"designed especially for students who have difficulty in the regular reading program ... The books should be of a type with which cultural minorities can identify strongly, should be representative of the cultural patterns of minority groups, and should contain numerous selections written from the point of view of minority groups."

(Note: The above specification applied only to textbooks chosen for students who have reading problems.)

A related criterion was found for all American history books, grades 7-8:

"Content in all textbooks wherever relevant to topics to be studied shall reflect fairly and objectively the multicultural nature of American society, emphasizing

a. the rich diversity of the American heritage: the contributions of peoples of various religious, nationality, and ethnic backgrounds to the nation's history and development

b. the continuous struggle for freedom and for recognition of the dignity of all mankind."

In 1969, members of the Texas Textbook Committee were also given a set of "General Criteria for Evaluating Textbooks." This consisted of a set of from five to ten questions on the following topics:

- Philosophy of Authorship
- Content
- Readability (style)
- Illustrations (style)
- Instructional Aids (style)
- Accompanying Aids

In many cases these questions were quite specific, for example, under "Content":

"Are the learning steps arranged in a sequence which considers previous learnings, which provides for individual differences?"

The only reporting of conclusions possible was on an "Appraisal Sheet for Textbooks Offered for Adoption." These were used by members of the Textbook Committee "if they choose to do so." The appraisal sheet asks for ratings, on a scale of one to five (from "superior" to "unteachable") in the following areas, comments also being requested:

1. reliability of authorship
2. quality of typography and format
3. suitability of vocabulary and style for subject and grade
4. supplies valid and worthwhile material
5. quality and quantity of illustrative material
6. accuracy of teaching aids
7. covers subject matter adequately
8. organization of content for effective learning
9. meets pupil interests and needs
10. sustains desirable attitudes and values.

A second step was part of the Texas materials selection process in 1969. Members of the State Education Department reviewed all books recommended by the Textbook Committee. Staff members checked specifically to see that the books were in compliance with Exhibit A, and also used criteria which they developed for particular subject-matter areas.

In 1976, the materials selection procedures outlined above were basically the same, with the exception of the two forms, "General Criteria for Evaluating Textbooks" and "Appraisal Sheet for Textbooks Offered for Adoption." These two forms had been discarded as obsolete. Both the Textbook Committee and the State Board of Education staff use as criteria the Proclamation for 1975, which contains the policy of the State Board of Education, and Exhibit A (for 1975), which contains the course of study and content requirements for each subject area in which adoptions are being made. The scope of these two documents has been greatly expanded.

The Proclamation has added a section titled "Textbook Content--General." This section mandates that the content of all books adopted should be in accordance with Exhibit A, and that "textbook content and suggested readings which are in violation

of these general content requirements and limitations shall be deleted from ary adopted textbook and teacher guide prior to purchase of the textbook by the state." There follow a number of general criteria, which are summarized below:

- Evolution should be identified as theory, not fact, and as being "only one of several explanations of the origins of humankind."
- Textbooks should contain no material of a partisan or sectarian character.
- Books should teach citizenship and understanding of the free enterprise system, and should emphasize patriotism and respect for recognized authority.
- They should not have blatantly offensive language or illustrations, should not dwell on violence, and should not present materials which might cause embarrassing situations in the classroom.
- They should present varying life styles, and treat divergent groups fairly, without inaccurate stereotyping. They should reflect the positive contribution of all individuals and groups to the American way of life and should present examples of men and women participating in a variety of roles and activities.
- They should present factual information objectively, and should be organized to facilitate both teaching and learning;
- "In the developmental stage of each textbook, authors should have field tested the material with teachers and students in planned field trials or pilot tests. Written evidence from such testing, showing how the publisher (authors) used the results of the field trial or pilot test in completing the book, should be made available to the State Textbook Committee."

One other notable requirement of the Proclamation is that "Publishers who offer books for this adoption that are revisions of textbooks now under contract must file by June 21, 1975, a complete list of deletions, additions, and changes in printing, illustrations, organization of materials, and format."

Exhibit A: Description of Content of Textbooks is even more detailed than the 1969 versions. (Since the subject matter covered in 1969 is not exactly the same as that covered in 1976, it is not possible to compare actual changes in requirements for subject.) There is an increased emphasis on presenting racial and ethnic minorities fairly and avoiding stereotypes; there is also more attention given to prescribing that materials fit varied student learning styles and abilities, and that a variety of teaching tools and helps be provided, especially to help the

teacher use the materials in individualized learning programs. A final section of Exhibit A, which gives "Criteria for Systems in Subject Areas" for bilingual education, is even broader ranging than the specific subject matter sections and prescribes criteria under the following headings:

- Child Development
- Research and Development
- Instructional Approaches and Materials
- Classroom Needs

The Research and Development Criteria include directions for how developmental tests of materials are to be carried out, and how results are to be reported. This section is referenced in the Proclamation section, which requires that all books chosen have undergone the developmental field test. The criteria state:

> "In advance of offering the material for general distribution, and sale, a controlled field test is conducted to determine: (a) appropriateness for the target population designated by such factors as cultural background, developmental levels, and special needs (e.g., language, motor); (b) effectiveness for the specified purposes; and (c) strengths and weaknesses to be considered in revision.
>
> "The design of the field test is stated in specific terms, including explanations of procedures for achieving points (a), (b), and (c) under the paragraph above. Scientific research methods are employed in testing the material. The particular research steps or methods employed -- e.g., descriptions of instruments, hypotheses, experimental and control groups, sampling methods, statistical treatment, findings -- are provided. In addition, the developer reveals the steps that are taken in applying field-test research findings in materials revision."

2. Comparison of Criteria Used by Intermediate Service Agencies

The following criteria were used in 1969 and 1976 by a sampling of ISAs to evaluate nonprint media. These checklists were used mainly to evaluate single films or filmstrips and thus are simpler than those lists used for evaluating textbook series. However, some of the trends discerned in the analysis of SEA criteria can be seen in the following lists. Of the four EPIE design constructs, Contents is of primary importance, with some attention paid to Methodology. The points covered under Contents deal mainly with accuracy, organization, and appropriateness to students. These concerns were fairly constant in the 1969 and 1976 versions of the form. However, unlike the SEAs surveyed, none of the ISAs required that patriotic and moral values be part of the material's content; nor did they require that materials be screened for racism and sexism. Both CREC and BAMEG added points related to Methodology in the 1976 form. BAMEG evaluated whether material was appropriate for individual and group use and added a rating section for the teaching guide. CREC evaluated the flexibility of the material and the teacher's reason for using it.

None of the ISA criteria required any consideration of the Intents of the materials, and only CREC gave any attention to Means of Evaluation. The evaluation component appeared in the 1969 CREC form as a request for consideration of pre- and posttest results. By 1976, this criterion had been replaced by a rating of "student response."

As with the SEA criteria, great attention was paid to Additional Considerations, but the only points covered involved technical and aesthetic qualities of the material. No mention was made of L-BR or of community acceptance.

One final note: The EPIE criteria model provides not only for objective analysis

of a product's instructional design, but also for user information about the product (see P. K. Komoski, "Comments on the Quest for Common Criteria" in Part I). Each of the ISAs was primarily interested in obtaining, through its criteria checklists, user data from teachers and students to apply to future decisions about the purchase and use of the materials.

Capitol Region Education Council, Connecticut

In 1969, METRO, a media center serving school systems which belong to the Capitol Region Education Council (CREC) in Connecticut, required that teachers using materials from the center complete an "Evaluation Report" and return it with the item. The form had a section for preview and one for utilization of the item. The preview section asked for a good, fair, or poor rating for the following (and space was provided for comments):

- correlation with curriculum
- authenticity and accuracy of information
- appropriate for grade level
- technical quality
- probable interest and motivation to students

The utilization section asked for a good to poor rating of:

- pretest results
- posttest results
- response of students

and a yes/no rating for:

- film has high correlation with required curriculum
- film is usable to complement curriculum only

By 1976, the evaluation form had been revised a number of times. The form now asks for simple yes/no answers to questions of authenticity, grade and subject level, role of materials in curriculum, and purchase recommendations. It also provides comment spaces to answer the following:

- What are the weaknesses and/or strengths of the material? (i.e., how could the presentation have been improved? In what way was it effective?)
- What kind of student response did you get?

- If you have answered NO to any of the above questions (about content) please explain.

Room for additional comments is provided, and reviewers are asked to rate materials in comparison with others they have used, on a line scale from 0 (poor) to 10 (excellent).

In early 1976, METRO was also piloting yet another series of revised forms. Changes include the requirement for identification of learner type, and the addition of the following questions and directives:

> "Ask yourself these questions. Do you have the impulse to use the material again? Do you think it will stand the test of time, or is its impact related to some current situation, event, or personality? Did it change the way your students look at things? Did it deepen their understanding, give new insights? Then write your comments here.
>
> "Does the material carry emotional impact?
> Does it have aesthetic value, style, imagination?
> Is it a stimulating presentation?
> Briefly state the purpose for which you chose this material (i.e., what did you want it to accomplish?)
> How effectively did the material meet this need?"

The student reaction section is more detailed than the 1976 form. Teachers are to rate, on a scale of low to high, students':

- interaction
- inquiry
- participation
- interest
- response
- motivation

Evaluators are directed to quote and/or attach student comments to the form.

Bay Area Media Evaluation Guild

The Bay Area Media Evaluation Guild, headquartered in Daly City, CA, is a cooperative project started in 1968 by librarians in the San Francisco Bay area working with nonbook media in school libraries. BAMEG tries to cover the filmstrip field as comprehensively as possible; very limited coverage is also made of phonodiscs, audiotapes, 8mm film loops, study prints, kits, and transparencies. Sixteen

millimeter films are not evaluated.

Evaluations are made in a two-step process. Each member elicits teacher, consultant, and student reactions before filling in an evaluation form. The reviewer then gives an oral evaluation before the BAMEG group. Comments and critiques of the group are then incorporated into the final reviews, which are printed and mailed to participating members following each monthly meeting.

The above procedures have been in effect since 1968, but the evaluation forms have undergone some changes. The 1969 form asked for ratings of excellent, good, or poor. These ratings were clearly defined on the evaluation sheet. For example, a "poor" rating meant, "A weak production, poor in concept, technical quality, or organization. Not recommended for library purchase."

The 1969 form also asked reviewers to incorporate the following in their written evaluation of the material:

Description
- Series title and individual titles; producer; date and price.
- Ratings

Content
- type of illustration
- type of text
- accompanying material: guides, recordings, etc.

Points to Consider
- * accuracy
- comprehensiveness
- * logical sequence
- * suitability of material to the medium
- point of view
- possibilities for use
- * effectiveness of captions or narration
- * technical production
  - visual quality
  - sound quality

(* elements in common with 1976 form)

The 1976 form still asks for a rating. "Fair" has been included as a possible

rating, but the ratings are no longer defined as quality and purchase options. However, the "Criteria to Consider" form has been expanded as follows:

Authenticity
- *accuracy
- impartiality
- up-to-dateness
- relevance

Appropriateness
- vocabulary
- concepts
- subject correlation
- individual/group use
- *suitability to medium
- appeal to students

Organization
- development
- scope
- *sequence
- pace
- balance
- *narration
- *captions

Technical Production
- artwork quality
- photo quality
- color quality
- composition
- audio quality
- vocal quality
- numbered frames
- ease of coordination

Special Features
- packaging
- guide
- cost

As the asterisks show, there are few actual criteria in common between both lists. Though others are related (for example, "possibilities for use" seems to have become "individual/group use") the 1976 list seems to be more precise and detailed in its scope.

Another added element in the 1976 criteria is a section for commenting on and rating the teaching guide, and for noting whether it contains objectives, background, summary, script, questions, activities, and/or bibliographies.

3. Comparison of Criteria Used by Local Education Agencies

The following criteria were used by 10 LEAs (and one county school district, included here because it functions as an LEA) to select and to evaluate instructional materials in 1969 and in 1976. Three of the LEAs focused attention only on nonprint media; the others dealt with textbooks, and in three cases (New York City, Newark DE, and Seattle) with library books and other supplementary materials. Seattle even provided guidelines for the selection of free or "sponsored" materials.

Most of the criteria were of the same level of complexity in both 1969 and 1976. Only two cities, Newark DE and Greenwich CT, had expanded their criteria from brief lists to more detailed statements. However, the majority of the 1969 forms were quite comprehensive, and, by 1976, all had been revised and adapted to reflect changing concerns.

Analysis of these LEA criteria according to the EPIE model shows that the major emphases were the same as at the state level: The most attention was paid to Contents and Additional Considerations. On the whole, the LEAs did pay slightly more attention than the SEAs to Intents and Methodology. And, there were more attempts to elicit user comments about the materials.

In 1969, at least three LEAs had some criteria for Intents, specifying learner goals to be achieved by the materials. Mount Airy NC required that materials should "stimulate an inquiring mind, develop reading tastes and interests..." New York City required that the materials "follow and interpret the objectives of the course of study." Phoenix required "directions for teachers in terms of overall aims and objectives."

By 1976, Phoenix also required that texts motivate students to self-examination of attitudes and behaviors with regard to social fairness. Only Pittsburgh required, in 1976, that materials actually have "goals and objectives which are defined and evidenced in the content of the material."

As in the case of the states, most criteria items were related to Contents. The most common revisions in criteria from 1969 to 1976 were in the areas of social fairness. In 1969, only New York, Phoenix, and Detroit required that materials be screened for racial and ethnic stereotyping. By 1976, two trends were in evidence: More cities had added criteria screening for racial and ethnic fairness, and, for the first time, attention was paid to the need for nonsexist materials. Detroit, which had in 1969 a sweeping, detailed set of criteria for nonracist stereotyping, had, by 1976, revised and reworded these criteria to include provisions for fairness toward women. Two cities seem, however, to have taken two steps forward and one backward. Phoenix expanded its treatment of "sensitive areas" to include "enlightened" points, for example: "Do the illustrations make apparent the group representation of individuals -- Caucasian, Afro-American, Indian, Chinese, Mexican-American et al?" Yet, Phoenix has no mention at all of the treatment materials should pay to the role of women. And Newark, which adopted almost totally Delaware's detailed and concerned list of criteria for social fairness, managed to dilute the impact of these points through revisions and critical deletions.

As with the SEAs, the LEAs show concern that the content of materials expresses American values. In 1976, three LEAs had added sections dealing with materials that might be controversial. Arlington County took the startling step of decreeing that "the treatment of social issues in all instructional materials should be carefully considered, using the evaluative criteria outlined in 1949 by the

National Convention of the American Legion."

In 1969, almost all LEAs included some points which relate to Methodology. Most often, these points specified the quality of teaching guides. Seattle also specified that materials be adaptable to classroom situations and varying abilities of students. Arlington County required that "Suggestions for teaching are provided to cover a wide variation in abilities." New York City specified that material have provisions for individual differences and that suggested activities "possess a high degree of utility." By 1976, other LEAs required that materials meet a variety of teaching/learning styles. For example, Mount Airy's only major addition to its criteria was a specification that materials "fit the needs and ability of all students."

Means of Evaluation was ignored by all LEAs in 1969 criteria. By 1976, only Houston mentioned this design element, asking for "variety in evaluation procedures."

As was true with the states, Additional Considerations were an area of prime concern. Without exception, all LEAs were most interested in the physical qualities of instructional materials. But in 1976, concern for community acceptance was in evidence. Mount Airy had added a section on "Challenged Materials," giving procedures for dealing with objections to materials. Seattle (which had, in 1969, a set of procedures for handling complaints about materials) decreed in 1975 that schools should "provide to parents and guardians an opportunity to review, within a reasonable time frame, those instructional materials which will be or are being used in their children's courses of instruction." And Arlington County's 1976 criteria stated "Both parents and professional staff members are expected to give attention to evaluations of

instructional materials in regard to ... content that may be detrimental from the standpoint of politics, morals, ethics, religion, or doctrine inconsistent with American ideas, form of government, or way of life."

As with the states, the only 1969 requirement for product research and development evidence was the nebulous requirement that the author have good credentials. By 1976, two LEAs showed awareness of the need for L-BR. Pittsburgh's criteria asked for evidence of "field testing/learner verification." And, New York City provided detailed guidelines for a pilot program of "learner-based revision" to improve the quality of materials in elementary school reading and in elementary school bilingual mathematics, science, and social studies materials.

In 1976, some LEAs were also paying increased attention to the "user feedback" portion of the EPIE model. Most criteria forms contained sections for "comments" and both Seattle and Houston required teacher and student input about the materials. Seattle required that materials be given a classroom tryout before final selection. Houston included a detailed series of criteria for rating student reactions to the materials, and also encouraged teachers "to seek pupil suggestions and opinions about the books."

The criteria summaries in the following sections illustrate in detail the points cited above. As with the SEAs, each set of 1969 criteria has been summarized and then compared with the criteria in use in 1976.

Education Service Center, Region I

In 1969, the Migrant Media Center, part of the Education Service Center, Region I in Edinburg, Texas, used a film evaluation form for both prepurchase preview and continuing evaluation. The film collection (aimed at meeting the

needs of students from migrant-worker families) was revised on the basis of evaluation forms received from teachers.

In 1976, the procedure for both previewing films and revising the collection was the same. The evaluation form has been somewhat abridged. The original form asked for a rating (from 1, "excellent," to 5, "poor") of 12 major criteria. Five of the 12 referred to the technical quality of the film stock, and to the mechanics of scheduling and delivering films. These items have been deleted from the 1976 form, along with a rating of the film as "basic, related, or enrichment," and the question "Is the motion picture the best way to present the contents of the film?" The following items are identical on both lists:

1. Correlation with curriculum;
2. Authenticity and accuracy;
3. Organization: Is it effective?
4. Does the film make a significant contribution to learning?
5. For what grade level was the film most suitable?

Two new items have been added:

- Overall estimate of film (fair, good, or excellent)
- There is an obvious need for this film and it should be one of next few titles purchased (yes or no)

Comments sections are provided on both forms. The rating scale remains the same.

City of Phoenix, Arizona

In 1969, the Phoenix Union High School System in Arizona had a set of detailed criteria for adoption of textbooks. (Arizona adopts on a statewide level only elementary-school materials.) The criteria consisted of from three to 13 questions under six major headings. Evaluators were to answer each question by checking columns marked "poor," "satisfactory," or "excellent." A summary rating using the same scale was also requested. The six major headings are listed below with sample questions to illustrate the scope of the criteria. Parenthetical numerals indicate the number of questions in each section.

- Content (7)
  Is the material presented in such a way that students are led to think out solutions and not merely to memorize facts?

- Author (3)
  Do the authors and/or consultants have teaching experience on the particular level and in the subject area being considered?

- Date of Publication (3)
  Is a recent copyright date the result of a real change, or a cursory or minor revision of materials from former editions?

- Treatment of Sensitive Areas (5)
  Are stereotypes avoided in terms of racial, religious, and ethnic background?

- Physical Characteristics (7)
  Do the illustrations reflect the multiethnic character of our society?

- Teaching Aids (13)
  Are directions provided for the teacher in terms of overall aims and objectives?

The 1976 criteria used by Phoenix selectors remains the same for "Content," "Author," "Date," and "Teaching Aids." The "Treatment of Sensitive Areas" section has added five new criteria which make more explicit the earlier attention to questions of fairness. For example:

- Does the book present a significant number of instances of fully integrated human groupings and settings to indicate equal status and nonsegregated social relationships?

- Do the illustations make apparent the group representation of individuals -- Caucasian, Afro-American, Indian, Chinese, Mexican-American, et al.?

The other questions in this section add new dimensions: One requires that urban, as well as rural and suburban, life be portrayed; another that textbooks motivate students to self-examination of attitudes and behaviors with regard to fairness, and to the realization of their responsibilities as citizens. One final change is the revision of the question concerning illustrations in the "physical characteristics" section. The question now reads: "Do illustrations clearly show racial features of different ethnic groups?" However, there is no mention of avoidance of sexist stereotypes, and no requirement that men and women be shown in a variety of roles.

Specific subject matter criteria are also developed by textbook selection committees for each area, and relate to particular needs for each course of study.

City of Greenwich, Connecticut

In 1969, the Greenwich, Connecticut, School System used a brief evaluation form for audiovisual materials. The form was aimed at eliciting only the evaluator's estimate of appropriate grade levels and his/her judgment as to whether the material was essential to the curriculum, supplementary, or of "questionable value." A brief comments section was also provided.

The form used in 1976 by Greenwich evaluators of audiovisual materials was much expanded. Teachers were asked to evaluate and comment on the following:

- Content
  - Description
  - Inaccuracies
  - Important omissions
  - Distinctive or unique? How?
- Grade Level
  - Grade level at which most students will enjoy/understand.
  - Is it for the beginner with no background in the subject area? Advanced?
- Comments
  - Stimulating
  - Informative
  - Clear
  - Confusing
  - Dull
  - Dated
  - Is the format appropriate for the subject matter?
  - How does this compare with other materials of similar scope in the same subject for the same grade range?

A final section asks for the role the material should play in the curriculum, as in 1969, but adds space for purchase or rental recommendation.

City of Hartford, Connecticut

In 1969, the Learning Resources Center of West Hartford, Connecticut, used a

variety of forms for eliciting preview and postuse evaluations of materials available from the center. Forms ranged from simple ratings of accuracy, presentation, and technical quality to a series of 15 questions concerning student interest, quality, and value of information and relevance to curriculum.

By 1976, all forms were combined into a "Simplified Evaluation Form for Audio-visual Media." The form is a 3" by 5" card which requests grade-level designation; curriculum subject; and recommendation for purchase, rental, or rejection of the material; and contains a request for comments.

City of Newark, Delaware

In 1969, the school district of Newark, Delaware, had a basic textbook evaluation form. Evaluators were asked to give their "overall impression" of the book (from excellent to poor) and to recommend further consideration, immediate use, or rejection of the book. Comments were also elicited. The district also, as the need arose, prepared more detailed, curriculum-related forms for evaluating specific textbook programs.

By 1976, the basic textbook form had been revised and expanded. Evaluators were to rate (from excellent to poor) each of the items summarized below:

- organization, appropriateness of material, authority;
- index, glossary, bibliography, A-V resources list, suggested activities;
- illustrations, maps, print, paper, etc.;
- overall impression.

Evaluators must also state whether the reading level of the material is above, on, or below grade level; recommend use of the book (basic or supplemental); and determine whether the book:

"Reflects an equipable [sic] and unbiased treatment of:

- minority groups
- minority viewpoints
- sex-stereotype

If not, please comment below."

In 1976, the form described above was not the only evaluative instrument used in the Newark school district. The district has developed a policy statement: "Criteria for the Selection of Textbooks and Other Instructional Materials" consisting of four parts:

(1) "Guidelines for the Selection of Textbooks," consisting of the "specific criteria" suggested by the state of Delaware and only one added requirement, i.e., that "study aids" include a "teacher/student list of nontextbook, instructional materials."

(2) "Guidelines for the Selection of Nontextbook Materials" with a "Purposes" section adapted from the American Association of School Libraries' School Libraries Bill of Rights, and the following set of criteria:

A. Selection should be made with due regard to the maturity level for which the materials are intended.

B. Materials should fill a need related to the curriculum, and shall serve a purpose in contributing to the development and enrichment of the student.

C. Books should help children to find joy in reading. They should be interesting in subject matter and treatment, stimulate learning and curiosity, and encourage exploration and creativity.

D. Consideration should be given to providing balance and proportion in the library collection and classroom resources, with adequate materials for varying interest areas. The collection should provide materials for students of various learning abilities.

E. Material selection aids approved by the American Library Association and other professional organizations should be consulted as guides.

F. Materials should provoke thinking, discussion, and insights as to occurrences and periods of time not possible through standard textbook sources.

(3) Guidelines for dealing with Controversial Instructional Materials based, in part, on the suggested state criteria, but with the expanded set of criteria are reproduced below:

A. Teacher Responsibility

- Be familiar with the book or material under question, referring, if necessary, to appropriate review sources.
- Be aware of individual differences in pupil interests and maturity.
- Make clear the purpose for which the material is used, and establish either its relevancy to the subject at hand or its personal relevancy to the pupil.

- Guide pupils to considerations of literary and social acceptability, bearing in mind that the question of what constitutes social acceptability is debatable. However, a consideration of criteria for judging social or literary acceptability is important. What each student gets from his reading is of major concern. Important to this concern is the fact that literature, through its capacity to reflect life, can provide vicarious experience. However, the establishing of criteria for literary excellence is necessary to help each individual develop a basis for personal selection.

- Alert the pupil to the possible availability and/or utilization of controversial materials on an elective basis.

- Avoid prescribed specific book lists in favor of individual recommendations. If recommendations are listed, keep them as broad and flexible as possible and provide ample choice.

B. Recommended Procedure for Selection of Controversial Materials

- Any teacher considering potentially controversial material is advised first to familiarize himself [sic] thoroughly with the mores and the pattern of expectancies, prejudices, and reactions within the school and the community.

- When a controversial book or selection is recommended by a teacher, reasons for the recommendation should be written and filed. If possible, the recommendation should be substantiated by statements from appropriate professional groups.

- It is advised that such recommendations be brought before the appropriate department or instructional group for consideration and that endorsement by a simple majority be sought. If a recommendation is not endorsed by a simple majority, the teacher is strongly advised to avoid using the material.

(4) "Basic Principles for Minimizing Sex and Other Biases in Instructional Programs," an adapted, somewhat abridged, version of the state criteria. It includes all eight points proposed by the state, with some minor rewording. However, the subsidiary points are reworded and abridged, and these changes do, at times, dilute the original strength of these criteria. For example, the original Delaware criterion states: "Identify and expose manifestations of racism, sexism, and prejudice..." while the Newark statement reads "Examine manifestations of racism..."

The following subsidiary points have been dropped entirely from the Newark version of these criteria:

- Convey the identity of minority individuals in illustrations.

- Provide recognition of minority groups and women by showing them frequently in positions of leadership.

- AVOID using "man" as the subject of generalized statements that apply to women as well.

- Present and identify various points of view.
- Provide personalized learning experiences.

City of Detroit, Michigan

As early as 1964, Detroit, Michigan, had 20 detailed criteria that were applied to all textbooks selected for use in the city. A special group, the Department of Intergroup Relations of the Division of School-Community Relations, used the criteria reproduced below to make a careful analysis of each of the textbooks selected by the city's various subject-matter selection committees.

Does this textbook or curriculum material in both its textual content and illustrations:

(1) Evidence on the part of writers, artists, and editors, a sensitivity to prejudice, to stereotypes, to the use of material which would be offensive to any minority group?

(2) Suggest, by omission or commission, or by over-emphasis or under-emphasis, that any racial, religious, or ethnic segment of our population is more or less worthy, more or less capable, more or less important in the mainstream of American life?

(3) Utilize numerous opportunities for full, fair, accurate, and balanced treatment of minority groups?

(4) Provide abundant recognition of Negro and other minority groups by placing them, also, and frequently, in positions of leadership and centrality?

(5) Depict both male and female adult members of minority groups in situations which exhibit them as fine and worthy examples of mature American types?

(6) Present many instances of fully integrated human groupings and settings to indicate equal status and nonsegregated social relationships?

(7) Make clearly apparent the group presentation of individuals -- Caucasian, Afro-American, Indian, Chinese, Mexican-American, et al.-- and not seek to avoid identification by such means as smudging some color over Caucasian facial features?

(8) Give comprehensive, broadly ranging, and well planned representation to the minority groups -- in art and science, in history and literature, and in all other areas of life and culture?

(9) Delineate life in contemporary urban environments as well as in rural or suburban environments, so that today's city child can also find significant identification for himself, his problems, and his potential for life, liberty, and the pursuit of happiness?

(10) Portray racial, religious, and ethnic groups in our society in such a way as to build positive images -- mutual understanding and respect, full and unqualified acceptance, and commitment to insure equal opportunity for all?

(11) Present social group differences in ways that will cause students to look upon the multicultural character of our nation as of prime meritorius and special value which we must esteem and treasure?

(12) Assist students to clearly recognize the basic similarities among all members of the human race and the uniqueness of every single individual?

(13) Teach the great lesson that we must accept each other on the basis of individual worth, regardless of race or religion or socioeconomic background?

(14) Help students appreciate the many important contributions to our civilization made by members of the various human groups, emphasizing that every human group has its list of achievers, thinkers, writers, artists, scientists, builders, and statesmen?

(15) Supply an accurate and sound balance in the matter of historical perspective, making it perfectly clear that all racial and religious and ethnic groups have mixed heritages, which can well serve as sources of both group pride and group humility?

(16) Clarify the true historical forces and conditions which in the past have operated to the disadvantage of minority groups?

(17) Clarify the true contemporary forces and conditions which at present operate to the disadvantage of minority groups?

(18) Analyze intergroup tension and conflict fairly, frankly, objectively, and with emphasis upon resolving our social problems in a spirit of fully implementing democratic values and goals in order to achieve the American dream for all Americans?

(19) Seek to motivate students to examine their own attitudes and behaviors, and to comprehend their own duties and responsibilities as citizens in a pluralistic democracy -- to demand freedom and justice and equal opportunity for every individual and for every group?

(20) Help minority-group (as well as majority-group) students to identify more fully with the educational process by providing textual content and illustrations which give the student many opportunities for building a more positive self-image, pride in his group, worthy models to emulate, knowledge consistent with his experience; in sum, educational material which offers the student meaningful and relevant learning worthy of his best efforts and energies?

By 1976, the above criteria had been extensively revised, and the title changed to "Evaluation Criteria: Treatment of Minorities and Women in Textbooks and Other Learning Materials." There are now 15, instead of 20, criteria. In some cases the changes are simply omissions or additions to the underlined sections of the list given above. In other cases, individual criteria were combined or reworded completely. The following summarizes the major changes, as compared with the above list:

(1) Underlined section deleted.

(2) "that either men or women, or any..." added;

(3), (4), (5), and (8) combined into the following two questions: Provide abundant, but fair and well-balanced, recognition of male and female children and adults of minority groups by placing them in positions of leadership and centrality?

Exhibit fine and worthy examples of men and women from minority as well as majority groups in art and science, in history and literature, and in all other areas of life and culture?

(9) Underlined words changed to "children," "themselves," "their problems," and "their potential" respectively.

(10) Changed to "Portray men and women, racial, religious, and ethnic groups, with their similarities and differences, in such a way as to build positive images?"

(11) Changed to: "Emphasize the multicultural character of our nation as having unique and special value which we must esteem and treasure?"

(12) and (13) combined: "and worth of every single individual, regardless of sex, race, religion, or socioeconomic background?"

(16) and (17) combined and reworded: "Clarify or present factually the historical and contemporary forces and conditions which have operated in the past, and which continue to operate to the disadvantage of minority groups and women?

(20) Eliminated

City of New York, New York

Materials selection practices used by New York City schools were not covered in EPIE's 1969 report. Since that time, EPIE has learned that the system is still using procedures established in 1955. However, these procedures are

currently under review by a citywide committee. The procedures include the following general criteria:

General Criteria Applicable to All Subjects: Educational Considerations in Evaluating Textbooks:

1. As to Subject Matter of the Textbook:

   a. Is the book the product of adequate scholarship and research by an author who, by training and experience, is regarded as competent in the field?

   b. Does the textbook follow and interpret the objectives of the course of study?

   c. Is the book designed to express and promote the curricular objectives of the subject?

   d. Does it contain any subject matter that tends to irreverence for for things held sacred?

   e. Does the content present unfounded opinions or biased views on racial, religious, moral, or political matters?

   f. Are both sides of controversial issues presented with fairness? (No attempt at influencing the child should be permitted.)

   g. Does the book contain any derogatory statements concerning racial or religious groups?

   h. Does it contain offensive humor in dialect form which reflects upon the dignity and democratic status of any group or race?

   i. Does the book contain matter which is so interwoven into the text as to give rise to misunderstanding and prejudice?

   j. Does the subject matter promote moral and spiritual values?

   k. Does it promote loyalty and Americanism?

   l. Does the book foster conceptions, loyalties, or practices which are alien to American democratic principles?

2. As to Treatment by the Author:

   a. Is the style clear, attractive, stimulating, and adapted to age levels of pupils?

   b. Are the language and diction suitable for grade?

   c. Is the material well adapted to provide for individual differences?

d. Has the content literary merit?

e. Does it contain objectionable slang expressions which will interfere with the building of good English habits?

f. Is the book in its presentation and treatment pedagogically sound?

3. As to Pupils' and Teachers' Use of Book:

a. Are the table of contents and the index complete and so arranged that material may be easily found?

b. Is there a glossary which gives the meaning and pronunciation of unusual and difficult words?

c. Are the illustrations, maps, sketches, tables, and graphs adequate in number, simple, clear, attractive, and suitable as visual aids?

d. Are there thought-provoking summaries and reviews at the end of each unit?

e. Do all the suggested related activities -- study helps, suggested readings, pupil and teacher activities, etc. -- possess a high degree of utility?

f. Is there a list of recommended reference books for further readings?

The procedures also give criteria for evaluating library books, test materials, maps, globes, films, recordings, and other audiovisual materials. A final section gives general subject matter criteria, noting that specific aims and objectives are found in the various courses of study. For example, mathematics materials for grades 1 through 6 should be evaluated in terms of the course of study and the following criteria:

- developing topics in mathematics in a meaningful way;
- providing a variety of well illustrated experiences reflecting daily living of children in a large city;
- providing material to supplement the experiences developed in the classroom;
- challenging pupils' thinking in problem solving;
- providing for practice through experiences rather than by isolated drill on number facts.

A 1975 "Report to the Chancellor" proposed updating the policies and procedures for guiding schools in the selection and in the evaluation of instructional materials. The report proposed that citywide criteria for selection of materials:

> "be established by a representative committee, appointed by the Chancellor, to guide school selection and purchasing. Community School Districts may add criteria suitable to local concerns."

The policy report did not recommend any specific criteria, either general or subject matter, but did strongly recommend that learner-based revision of materials be one important criterion of the selection process. These recommendations were found in the following excerpt from the report:

Improving the Quality of Instructional Materials:

1. Producers should be required to systematically have their products used by students as a basis for revision prior to offering such materials for sale to the schools. A system of Learner-based Revision* should be implemented. (A pilot program in Learner-based Revision has been initiated.)

2. Community Districts and schools should cooperate with producers in having materials used by students and in providing such feedback as may be useful for the revision of materials.

3. Pilot programs should be encouraged to determine the characteristics of optimum procedures for improving the quality of materials.

4. Data received by producers from schools related to student feedback should be shared with the Board of Education and serve as one criterion in the selection process.

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* "Learner Verification and Revision" is a term [originally] used by the Educational Products Information Exchange [EPIE] Institute in their guidelines.

As noted in the report, a pilot program of learner-based revision is being carried out. The program is sponsored by the city Bureau of Audio-Visual Instruction to improve the quality of materials in elementary school reading, and in elementary school bilingual mathematics, science, and social studies materials. The program is using a summary of the LVR Pilot Guidelines prepared by the EPIE-sponsored

National LVR Task Force to aid producers and school people in gathering LVR information. The New York "L-BR" guidelines and the guidelines for schools participating in the pilot program are included here (pages II-56--II-59):

Learner-Based Revision (L-BR) -- A Definition:

The L-BR process is a learner-based process for improving instructional materials.

Stated in a more definitional manner: The L-BR Process of Instructional Materials is an ongoing effort at the improvement of instructional materials based on systematic feedback from -- as the primary source -- learners who have used the materials.

In other words, with the L-BR process, publishers decide whether to revise their materials -- and specifically how to revise them, if they are to be revised -- on the basis of data from learners. These data can be collected from various people: directly from the learners themselves; from teachers who report their perceptions of learners in their classrooms; from staff members of publishing companies; and from other observers of learners using the materials. Also, these data can be collected in various ways: through classroom observations; through interviews with learners, individually and collectively; through interviews with teachers; through structured questionnaires filled in by learners and teachers; through criterion-referenced tests; and so on. And, finally, these data are assessed by publishers and, perhaps, by teachers and others.

Pilot Program

GUIDELINES FOR REPORTING LEARNER-BASED REVISION ACTIVITIES*

Descriptive Information on Product

The publisher should provide "catalog" information on the product, such as title, authors, copyright, medium or media involved, kinds of supplementary components, and so on.

Instructional Design

The "instructional design" of a curriculum product can be thought of as the overall learning plan for the product. The design should be described and the underlying rationale for that design should be stated.

Expected Outcomes

This should be a statement of what the publisher intends the product to accomplish with learners.

Condition of Use of Product

The publisher should specify the overall instructional setting intended for the product. Basically, this includes a description of what is termed the "target population" and a noting of the kinds and extent of "teacher preparation." The target population is simply the kinds of learners the product is intended for. Characteristics which may or may not be relevant are: grades students are assigned to because of their maturity, not achievement levels; actual grade levels, particularly with respect to reading achievement; ethnic backgrounds; family and community socioeconomic level. Teacher preparation involves such teacher-related matters as supplementary teacher materials, inservice teacher education and classroom preparation.

Techniques for Gathering Feedback

Techniques for gathering feedback from learners may include, but are not limited to, individual learner and classroom observations, interviews, questionnaires, and criterion-referenced tests. These techniques should be designed to gather data both on direct-learning effects and on affective reactions of learners.

Techniques used in large-scale, field-test validation attempts are not to be confused with techniques used for gathering learner feedback for the L-BR Process. Similarly, techniques used to elicit product testimonials for promotional purposes ("I like this textbook very much and so does my class") -- as opposed to reaction gathered as a result of questionnaires or interviews, which may be used in promotion pieces -- are inappropriate for the L-BR Process.

Description of Learners Used in L-BR Process

An L-BR selection -- because the aim of L-BR is to identify trouble spots

* These Guidelines were prepared by the National LVR Task Force sponsored by EPIE.

in order to improve materials, not to prove how well materials work -- may comprise a handful of learners from the target population or a handful of classes. In fact, a few students might be taken through the L-BR Process in the offices of the publisher, unless there are certain conditions of a classroom setting which are necessary and which cannot be approximated in the offices.

In summation, the publisher should report: (1) the procedure for selecting learners, (2) the relevant characteristics of these learners, and (3) the rationale for this step.

Analysis of Findings

After gathering data, the publisher analyzes the data. It is desirable that the publisher make known the analysis of the findings in an L-BR report. It may be, however, that the publisher would consider such information to be proprietary. In such cases, the publisher may explain the reasons for keeping the findings and the analysis of the findings confidential.

Specific Improvements Made

The analysis of findings enables the publisher to identify exactly where specific textual and contextual changes should be made. Improvements can involve aspects relating to learner materials (textual), such as verbal or visual communications, manageability, appeal to learners, goals and objectives, scope and sequence, various kinds of bias, motivational elements, directions to learners, activities for learners, and the congruence of product elements. Improvements can relate to teaching aspects (contextual), such as classroom preparation, record-keeping provisions, teaching design, and inservice education.

PRODUCERS PLEASE COMPLETE AND RETURN FORM BELOW

PERSON TO CONTACT FOR CLARIFICATION, MORE DETAIL, OR UPDATED INFORMATION:

Name _____ Position _____

Company _____ Division _____

Address _____

Telephone _____

Guidelines for Schools Participating in the Learner-based Revision Pilot Program

The following suggested guidelines are intended to assist schools participating in the L-BR pilot program:

1. Orientation

   - School representatives should meet with media producer.
   - Purposes of L-BR procedures should be understood.
   - Type, nature, and placement of materials should be detailed.
   - Teacher and student role in using materials should be clarified.

2. Class Identification

   - Select class (or classes) and teacher(s) for whom materials are most suitable.

3. Methods of Using Materials

   - Teachers should become familiar with materials.
   - Teachers should discuss intended uses of materials with producer's representative.
   - Teachers should determine how best to use materials, for example, with individual students, small, or class-size groups.

4. Method of Recording Student Reactions

   - Producer's representative may provide data collection materials.
   - Some procedure is needed to enable students to record their reactions to content which is unclear, ambiguous, not understood, too quickly presented, too simple, etc.

5. Assistance Available

   - A BAVI Supervisor will be available to participating schools to assist in organizing procedures. Call Mr. Morris Bergman at 596-5042 for any additional information.

Mount Airy City Schools, North Carolina

In 1969, Mount Airy Schools in North Carolina (an adoption state) accepted recommendations for instructional materials from "individual teachers, department heads, students, or committees composed of any of the above." The general policies for selection of instructional materials were:

"The objectives of selection of instructional materials will be

- to implement, enrich, and support the educational program of the schools;
- to provide a background of information on a variety of topics;
- to develop appreciation of good literature;
- to develop reading tastes and interests;
- to aid the learning process;
- to stimulate an inquiring mind; and
- to make available a wide variety of viewpoints.

"Materials will be selected to meet the needs and interests of low-, average-, and high-ability students of various backgrounds. They will be selected on the basis of

- overall purpose,
- subject matter,
- standards of publisher,
- significance of author or editor,
- student appeal,
- quality of format,
- quality of material,
- authoritativeness,
- need, and
- requests from faculty and students."

In 1976, the revised version of the above has few changes. One new "objective" has been added:

- to provide materials which fit the needs and abilities of all students within the school

The only alteration in the criteria section is the replacement of "need" with "cost." A section on "Challenged Materials" has been added. This gives after-the-fact procedures for dealing with objections to a material that has been selected.

City of Pittsburgh, Pennsylvania

In 1969, Pittsburgh public schools used an "Audiovisual Materials Evaluation Form" which required one of five ratings -- superior, excellent, good, fair, poor -- in each of the following areas:

(1) correlates with curriculum;
(2) is authentic and accurate;
(3) tells the story simply, in good sequence, and effectively;
(4) effectively helps to develop concepts;
(5) makes a significant contribution to learning;
(6) pictures are clear and meaningful; and
(7) sound.

Evaluators were also asked to specify appropriate grade levels and subject areas, to give a "general estimate" of the material, choosing one of the five ratings, and to recommend purchase, renting, borrowing, or refusal.

The version of this form in 1976 is much expanded, and includes a number of new criteria, which are to be rated in one of four ways: excellent, good, fair, or unsatisfactory. Revisions and additions to the basic criteria are:

Numbers (1), (6), and (7) remain substantially unchanged.
Numbers (3) and (4) have been combined and revised to:
- Concepts introduced are well developed and presented in sequence.

The following criteria have been added:
- Information presented is within the grasp of the intended learners;
- Goals and objectives are defined and evidenced in content of material;
- Content adequately covers subject for which it was developed;
- Content is up to date;
- Material reflects an integrated society;
- Material depicts women in a variety of societal roles; and
- Material is interesting and motivational.

Grade levels, subject matter designation, overall rating, and recommendations are still required. Following the above criteria questions, a final question asks: Is there any evidence of field testing/learner verification?

City of Houston, Texas

In 1969, the Houston Independent School District had a Textbook Adoption Committee to recommend books from the state list of approved textbooks. Every teacher in

every school who taught a subject for which materials were being adopted filled in an evaluation form. Textbook Committee members for each school summarized these evaluations and indicated the first, second, and third choices of teachers in their school. These reports were considered by the Textbook Committee in recommending books to be adopted.

The 1976 evaluation procedures are basically the same, with the addition of the following: "Teachers are also encouraged to seek pupil suggestions and opinions about the books."

The 1969 form for evaluating spelling textbooks asked teachers to rate each proposed book from 1 ("superior") to 5 ("unteachable") in each of 15 criteria. These criteria set standards for the physical quality and components of the programs, for suitability of the content to students' grade levels and interests, and for effectiveness of the teacher's guides. The book with the lowest number of points was considered the teachers' first choice. Teachers were asked to "give three strong reasons for the first choice."

The 1976 form for evaluating spelling materials has been expanded to 17 items. The rating system is unchanged, with the exception of "unteachable" which is now "unacceptable."

Seven items on the form are substantially the same as in 1969. Four items, including "reliability of authorship," have been dropped. The remaining new items deal with specific instructional methods, such as: "Grouping of words with similar spelling patterns." One notable addition is: "Variety in evaluation procedures." Teachers are no longer required to give reasons for the choice of the first-ranking book.

County of Arlington, Virginia

In 1969, Arlington County public schools in Virginia had a textbook selection committee to recommend textbooks from the list of state-approved materials. A general evaluation sheet required a rating -- good, fair, or poor -- for from one to 14 items in five major areas. These areas are listed below with examples of specific criteria. Parenthetical numerals give number of items in each section.

I. Format (5)
   A. Binding
   B. Paper
   C. Typography

II. Teaching Aids (5)

   4. Suggestions for teaching are provided to cover a wide variation in abilities.

III. Illustrations (2)

   1. There are accurate drawings and photographs.

IV. Content (14)

   A. Adaptation to the Curriculum
   B. Organization
   C. Accuracy
      6. The author indicates that there are conflicting theories or opinions of the issues under discussion.

      8. When critical controversial issues of the present are included in the material, these issues are presented in such a way as to lead toward better citizenship on the part of the students.

   D. Suitability
      2. The content approaches real-life problems with a personal approach.

Specific criteria for each subject matter area were to be attached to the general evaluation sheet.

In 1976, the criteria are much abridged. Though some items are similar, whole sections (teaching aids, illustrations, suitability) have been dropped and others have been condensed. The rating system has been eliminated, and three statements have been substituted for the general evaluation sheet. The statements,

with examples of subsidiary points, are:

1. The professional staff member of selection committees shall evaluate instructional materials from the standpoint of scholarship, teaching methods and techniques, consistency with curricula, K-12 continuity, and correlation with the goals and objectives of the course concerned.

2. Both parents and professional staff members of the committees are expected to give attention to evaluations of instructional materials in regard to these aspects of content and format, e.g. (5 items):

    a. Content that may be detrimental from the standpoint of politics, morals, ethics, religion, or doctrine inconsistent with American ideals, form of government, or way of life.

    c. Content that represents ethnic, sexist, or racial stereotyping.

3. The treatment of social issues in all instructional materials should be carefully considered, using the evaluative criteria outlined in 1949 by the National Convention of the American Legion, as follows:

    a. In the study of democracy, both its accomplishments and failures are examined.

    e. In dealing with controversial issues, both sides of the issue are fairly presented.

City of Seattle, Washington

In 1969, the State of Washington required that local school districts have a policy covering textbook adoption. Seattle Public Schools, in accordance with the state's requirements, had a comprehensive document detailing the adoption process and criteria to be used in selecting textbooks, supplementary books, library and reference books, and audiovisual materials. The basic policy for materials selection was:

> "Books and other instructional materials used in the Seattle Public Schools are selected (1) to offer material of high quality for use at all grade levels and in all subject areas, (2) to provide an effective basic education for all students, and (3) to insure flexibility sufficient for meeting the special needs of individuals and groups."

In 1969, there was a three-part procedure for selecting textbooks. A Criteria Committee developed a set of criteria which best satisfied the requirements of the subject and grade levels for which the books were being adopted. These

criteria were to be based on General Criteria for Evaluating Textbooks, established by the Curriculum Council of the Board of Education. These general criteria asked for a rating of excellent to poor of the "Format" (nine items about physical quality) and "Organization and Content" (16 items). The latter included such points as:

- Usefulness in providing situations for problem solving.
- Aid in stimulating students toward forming their own goals and toward self-evaluation.
- Adaptability of content to classroom situations and to varying abilities of individual students.

After subject matter criteria were developed, a Screening Committee rated all available books in the field according to both criteria. Those books chosen by the Screening Committee were used in classroom experimentation by selected teachers who filled in an evaluation form for each textbook used. (These forms, which were developed by the Screening Committee, were not available to EPIE in 1969.) The teachers' evaluations were summarized by the Screening Committee and submitted to the departmental director along with a rating sheet which ranked the books in order of teachers' preference.

The 1969 Seattle Public Schools selection procedures also included a set of nine Criteria for the Selection of Library books, some of which are reproduced below.

Criteria for the Selection of Library Books:

Books should be selected to meet the needs and interests of all students. Meeting individual differences of pupils requires a great diversity in the school library collection. Books selected should enrich and support the Seattle curriculum and the philosophy of the Seattle Public Schools.

General Principles:

1. Books must have social, political, and moral acceptability. They should emphasize desirable social attitudes, generate loyalty to the principles of American democracy, and foster values that are wholesome.

2. The content must be accurate, authoritative, and up-to-date. The author must be qualified in the field about which he is writing, whether it is fiction or nonfiction.

3. The reading difficulty of the books, including vocabulary, sentence structure, and concepts, must be suitable for the students for whom the books are intended. Books appropriate for all levels of maturity and ability should be in each school library.

4. The style of writing must be appealing, readable, and clear. The treatment of the subject must be dignified and sound, not crude, sensational, or distorted. Books selected will vary in literary quality, but the dull and mediocre should be avoided.

5. The need for books that heighten the imagination and stimulate creativity should be recognized.

The selection criteria included a simple Materials Evaluation Report to be used for all audiovisual materials considered for purchase. The form required assessment of grade levels and the role the material should play in the curriculum, a rating from excellent to poor, and a purchase recommendation. Evaluators were required to explain their recommendation.

The Seattle selection criteria had one other notable set of evaluation forms. These were for "free and sponsored materials," which city policy decreed must be carefully evaluated on the basis of established criteria. Such materials could not be used without a committee's evaluation and recommendation and the approval of the Assistant Superintendent for Curriculum Development. There were two forms available. Significant questions from the 10 "Criteria for Printed Materials" were:

1. Is the name of the organization publishing and sponsoring the material clearly shown?

8. If the material promotes or supports the point of view of any special interest group, is that point of view presented objectively and based upon authoritative data?

9. If this material is placed in the classroom, will it be balanced by materials presenting other points of view?

10. Can the material be used in the classroom without obligating the school in any way to any individual or group?

The six questions on the companion "Criteria for Films" cover the same ground, with the addition of: Is the film free of obtrusive or objectionable advertising?

By 1976, Seattle had updated and revised the above criteria. A section titled "General Goals and Principles" had been added which incorporates the policy statement quoted from the 1969 document, but which adds the following significant statements:

- "It is the policy of the Seattle School Board to provide to parents and guardians an opportunity to review, within a reasonable time frame, those instructional materials which will be or are being used in their children's courses of instruction." (However, nowhere else in the document -- which includes the schedules for adoption procedures -- is there provision made for parents to examine materials. There is only, as in 1969, a procedure for handling complaints about already-adopted materials.)
- "It is the goal of the Seattle School District that all programs, courses and materials (a) avoid negative, limiting, stereotyped portrayals of boys, girls, women, and men, and (b) present equality of the sexes through positive images of boys, girls, men, and women developing their full human potential."
- "Any process which leads to the selection of basic textual materials should give assurance that [three of five items; others deal with legal requirements] :
    - Students' interests are protected; the materials are intellectually sound. They avoid negative, limiting ethnic and sex-role stereotyping, and they present equality of the sexes and various ethnic groups through positive images of children and adults.
    - Teachers' expressed needs are considered; curricular and pedagogical requirements are satisfied.
    - Community interests are safeguarded; local political, social, moral and cultural environment is considered."

The three-part procedure for materials selection used in 1969 (criteria development, screening for criteria, classroom tryout) remains the same. The "General Criteria for Evaluating Textual Materials" is the same as in 1969, with one exception. Evaluators are to rate the material's "treatment of sexism and

ethnicity" from excellent to poor. This rating is to be based on "Adequacy in satisfying 15 questions" in a "Criteria for the Evaluation of Textual and Other Instructional Materials As to Their Treatment of Minorities and Women." This set of criteria is adapted from those used in the Detroit Public Schools, and is virtually identical with them, with the exception of a few minor editorial changes.

The above criteria are to be applied to textbooks by the screening committee, before the textbooks are cleared for use and evaluation by teachers in the classroom. Seattle at present has a Sex Bias Commission and a Multiethnic Curriculum Unit preparing a new set of criteria which will replace the 15 adapted from Detroit.

The Guidelines for Selecting Library Books have been expanded to include the following:

- Books should emphasize desirable social attitudes, generate loyalty to the principles of American democracy, and foster values of faith, honesty, and humanitarianism.

- Library books should be of sufficient variety to present opposing views of controversial issues in order that young citizens may develop the skills of critical analysis and informed decision making.

- Library books should contribute to the development of an understanding of the ethnic, cultural, and occupational diversities of American life.

- They should objectively present the concerns and build upon the contributions, current and historical, of both sexes and members of the several specific religious, ethnic, and cultural groups. It should be recognized, however, that under certain conditions materials considered biased may represent appropriate resources in presenting contrasting and differing points of view.

- They should provide nonstereotypic models which may be used as a vehicle for the development of self respect, ethnic pride, and appreciation of cultural differences based on respect for the worth, dignity and personal values of every individual.

The Materials Evaluation Form for Audiovisual Materials is basically the same, but now requires a yes/no answer to:

- Reflects multicultural content?
- Avoids ethnic and sex role stereotyping?

The policies for evaluating free materials remain the same; only one form is used for all materials, but it incorporates all of the basic questions.